

Calendar Year 2010 Louisiana TravelsAmerica Visitor Profile Report

December 2011

TNS 212 226663



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Introduction and Purposes of the Research

TNS is pleased to present this TravelsAmerica report for the Louisiana Office of Tourism. TNS conducts this online (data collection) project continuously throughout the year as a nationwide syndication. The results enable the assessment of visitor volumes and development of profiles of leisure visitors to the state.

As a tracking study, TNS and the Louisiana Office of Tourism constantly strive to improve the research. This report assesses the total volume of visitors to Louisiana plus those arriving from three key areas. The profile of Louisiana's visitors encompasses:

- Volume and source of visitors
- Basic demographics such as age, number of children in household, household income
- Trip characteristics such as day vs. overnight, business travel, travel expenditures, length of stay, activities selected, travel timing (quarter), mode of transportation
- Visitor residence by state and DMA
- Satisfaction with Louisiana as a destination
- An Export/Import assessment of spending by Louisiana residents traveling elsewhere vs. non-Louisiana residents visiting Louisiana
- Competitive destination comparisons to Louisiana

Introduction and Purposes of the Research *continued*

■ Specific segments of visitors:

- In-state residents
- High BDI Marketing Area (Above average number of visitors from DMA; see appendix)
- Residents living elsewhere (neither in-state nor in the High BDI Marketing Area)
- African-Americans
- Hispanics
- Mature visitors (defined as those 55+).

■ Six regional profiles:

- Alexandria
- Lake Charles
- Baton Rouge
- New Orleans
- Lafayette
- Shreveport.

■ Seven markets (very small samples):

- Dallas
- Chicago
- Houston
- Los Angeles
- Atlanta
- New York City.
- Memphis

The report continues with the Executive Summary followed by the Results of the Research section, which includes detailed tables and graphics of findings. The appendix contains a description of the Business Development Index by DMA, the research methods, and a glossary of terms.

One page overview

Abstract

Derived from the TNS TravelsAmerica syndication, highlights from this fourth annual report prepared for Louisiana Office of Tourism for Calendar Year 2010 (January 1 through December 31, 2010) include:

- Louisiana stabilizes in 2010 as US Tourism rebounds from a weak 2009. Post-Katrina, post-Gulf Oil Spill, post-recession Louisiana has the potential for revitalized tourism and could market itself as a “new” destination.
- Louisiana successfully draws tourists from in-state and nearby areas (High BDI Marketing Area), but can target the more distant market again as it recovers (28% from 23% in 2009 and 28% in 2008).
- For information, Louisiana visitors still most heavily rely on past experience, word of mouth (friends/relatives), and various Internet sources. More similar to the US as a whole than in the past, Louisiana visitors book travel purchases (46% vs. 49%) online almost as often US travelers.
- Because visitors often arrive from in-state or from the High BDI marketing area, most drive (70%). That said, some areas, most notably New Orleans, draw visitors from farther away, who in turn, tend to stay longer and spend more. Those distant visitors are harder to attract, but worth more once they come.
- Special markets (African-Americans, Mature Travelers, Hispanics) each have unique travel patterns, preferences, and desires that Louisiana can fulfill and promote – *gaming, nightclubs, fine dining, historical sites, and shopping* are just some of the features where Louisiana fits well with these groups.
- Each destination within Louisiana has attributes that attract visitors – New Orleans perhaps has the greatest variety, but Shreveport and Lake Charles attract gaming tourism, especially among retirees, while several areas get credit for good shopping. They each have strengths to lure potential tourists.
- From another point of view, the different source markets find different aspects of Louisiana appealing, which can help to guide future promotions. For example, *fine dining* and *urban sightseeing* appeal to most, New Yorkers feel more affinity for *museums*, Memphis and Atlanta show more interest in *gaming*.
- The tourism export/import “balance of trade” assessment becomes even more positive in 2010, as Louisiana lures more residents from outside the state (exports); however, encouraging domestic spending remains important as well.

Executive Summary/Implications

Importance of tourism to Louisiana

Several measures underscore the importance of tourism to Louisiana:

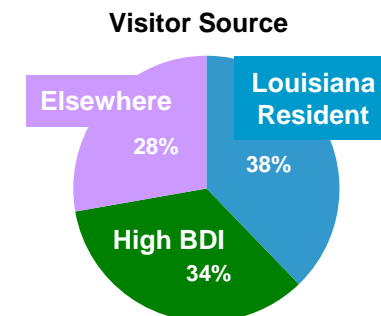
- **Volume of Visitors.** Although the TNS visitor volume differs from volume numbers shown by some of Louisiana's other resources, it is important to note that in 2010, TNS' measure of Louisiana's visitation stabilizes after slipping each year since 2006. In addition, Louisiana continues to attract more visitors than Arkansas and Mississippi, narrows the gap behind Alabama but, of course, trails the much more populous Texas and Florida.
- **Overnight Volume.** Louisiana visitors usually stay overnight (72%), slightly ahead of last year (69%) and total US travelers (70%). The average length of stay hovers near three nights, similar to most other nearby states (but lags Florida's 4.6 nights). Even more positively, those staying in paid accommodations (hotel/motel/B&B) continues to rise, now at half of all over-nighters (50% from 47% in 2009 and 42% in 2008), and exceeds all primary competitors (37% to 42%) except Mississippi (52%).
- **Travel Spending in Louisiana (excluding transportation).** Aided by the growth in paid accommodations, Louisiana visitor spending gains slightly (\$437 from \$427). Further, it surpasses all competitive states with the exception of Florida (\$723).
- **Balance of Trade.** The volume and spending level for Louisiana enable it to increase its "surplus" in 2010. Exports (travel dollars coming into Louisiana from non-residents) widens its gap over imports (Louisiana residents who spend travel dollars outside Louisiana). In addition, many domestic travel dollars remain in the state (Louisiana residents traveling locally). Exports = 55%; Imports = 35%; Domestic = 10%.

Executive Summary/Implications

Importance of tourism to Louisiana - *continued*

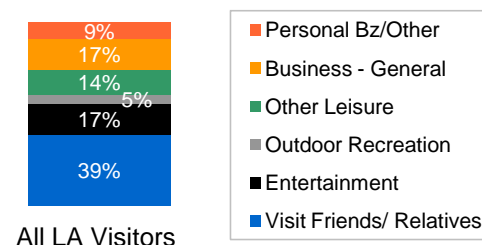
Several measures underscore the importance of tourism to Louisiana - *continued*:

- **Source of Visitors.** Louisiana builds strong tourism with nearly two-thirds of Louisiana's visitors living outside the state (34% from the 28 High BDI Marketing Area states and 28% from more distant markets).



- **Trip Purpose.** Leisure travel (74%) continues to be the greatest source of visitation compared to business (17%) or other travel reasons (9%). Visiting friends/relatives (39%) dominates leisure travel, followed by entertainment (17%).

Trip Purpose All LA Visitors CY 2009



- **Timing.** Visitation to Louisiana, just like national travel, peaks in summer in 2010 – a shift from the past, when Louisiana's greatest visitation occurred in the spring months. However, those traveling from farthest away (non-resident, non-High BDI) visit similarly through spring, summer, and fall, proving its ability to promote the shoulder season to those potential visitors.
- **Business Travel.** Business travel behaviors/choices differ from leisure travelers. While they represent fewer trips (17% vs. 74% strictly leisure), they more often fly (32% vs. 12%), stay longer (4.1 vs. 3.1 nights), pay (hotel/motel) for lodging (3.7 vs. 1.2 nights), and are more likely to travel alone (62% vs. 20%).

Executive Summary/Implications

Profile: Trip and travel characteristics

- **Demographics.** Louisiana visitors generally mirror last year and Total US Travelers, with some variations, most notably ethnicity. Differences also appear by residence with in-state Louisiana visitors often lagging the Total Louisiana visitor.

Visitor Characteristics (Louisiana CY 2010; Louisiana CY 2009; Louisiana CY 2008; Total US CY 2010; Total US CY 2009)

No/Very Little Difference

Age	(47; 46; 45; 47; 46)
Married	(59%; 61%; 58%; 60%; 61%)
With Kids	(32%; 32%; 36%; 33%; 35%)
Future Shaper/Maker	(33%; 33%; 32%; 31%; 31%)
Retirees	(17%; 17%; 17%; 16%; 16%)

Minor Differences

Income	(\$67K; \$65K; \$66K; \$74K; \$71K)
College Grad	(45%; 38%; 40%; 47%; 45%)

Larger Variances

African-American	(16%; 17%; 16%; 6%; 7%)
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Characteristics That Vary by Residence (In-State; Total Louisiana Visitor)

Younger	(43; 47)
Less Affluent Income	(\$57K; \$67K)
Fewer Married	(55%; 59%)
More with Children	(38%; 32%)
Fewer College Grads	(35%; 45%)

Executive Summary/Implications

Profile: Trip and travel characteristics - continued

- **Travel Planning Horizons Remain Short, But Vary by Distance.** Many (42%) Louisiana visitors decide to take the trip relatively spontaneously (within two weeks of departure), but the spontaneity declines with increasing distance (and travel time): in-state (59%), High BDI Marketing Area (43%), elsewhere (25%). Mature visitors (34%) are also somewhat less likely to make a last minute decision.
- **Travelers Primarily Rely on “Experience” for Information.** Similar to other travelers, Louisiana visitors rely most heavily on past experience (32%) and word of mouth (18%) for information to plan a trip. While the Internet is a popular place to gather information (24%), just one traveler in 10 (10%) currently uses destination websites. Printed information (5%) has even less reach and impact.
- **Louisiana Visitors Book “Offline” More Often Than Others.** Louisiana visitors book online more often than offline (46% online vs. 39% offline), and do so just slightly less frequently than total US travelers (49% online vs. 37% offline).
- **Most Visitors Drive.** About three-quarters of visitors drive to their destinations (70% to Louisiana vs. 74% Total US). The proportion, as expected, declines with distance: residents (88%), High BDI Marketing Area (74%), and elsewhere (40%).
- **Overnighters Spend More.** Not surprisingly, because of the additional time spent on the trip and because they incur lodging expenses (averaging 3.2 nights), overnight visitors spend 2½ times as much as day trip visitors (\$624 vs. \$248).

Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments

Given differing travel habits and motivations, marketing messages can be tailored to increase relevance for key target groups. Three separate markets covered by this report include (comparisons shown below are the segment vs. all Louisiana visitors):

■ African-American Visitors:

- **Demographics:** This group comprises one sixth (16%) of all Louisiana visitors. In many ways, they trail other visitors – younger (39 vs. 47), less affluent (\$52,600 vs. \$67,200), less often married (37% vs. 59%, which contributes to lower reported incomes), more often (31% vs. 23%) live alone, and slightly less likely to have full-time employment (58% vs. 64%). Their employment level slips notably from last year (58% from 68% in 2009), suggesting that this segments feels the recession to a greater degree than others, despite (or maybe because of) their youth.
- **Travel Patterns:** Half travel to Louisiana to visit friends and relatives (50% vs. 39%), thus representing a less profitable niche. While they stay overnight almost as often (67% vs. 72%) and for an even longer time (3.4 vs. 3.2 nights) than total Louisiana visitors, they more often opt to stay with friends or relatives (50% vs. 38%). They spend less (\$360 vs. \$513) than every other segment except in-state visitors (\$192).
- **Activity Choices:** These young African-Americans choose nightclubs/dancing much more often than Total Louisiana visitors (10% vs. 6%) and more of them add gambling to their list of activities than Total visitors (22% vs. 17%).

Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments - *continued*

■ Hispanic Visitors:

- **Demographics:** The smallest of the key segments (3.5% of Louisiana visitors) and, consequently (caution to reader), reflect a small sample size (n=31). This group is somewhat younger (43 vs. 47), but earn similar incomes (\$66,900 vs. \$67,200), probably aided by dual-incomes since more of them are married (74% vs. 59%). More of them live in larger (3+) households (59% vs. 43%) and with children (47% vs. 32%).
- **Travel Patterns:** Similar to others, they usually travel for pleasure (75% vs. 74%). They represent a potentially profitable niche as they more likely stay overnight (82% vs. 72%) and for a longer time (5.8 vs. 3.2 nights), although not as hotel guests (38% vs. 50%). They spend at average levels (\$494 vs. \$513).
- **Activity Choices:** They seem to like to *shop* (22% vs. 18%), *sightsee rural areas* (16% vs. 10%), and visit *museums* (12% vs. 8%) and *old homes/mansions* (12% vs. 6%).

■ Mature Visitors:

- **Demographics:** Representing a third (34%) of Louisiana visitors, this group, by definition, is older (64 vs. 47). Somewhat more affluent (\$73,700 vs. \$67,200), more of them claim to be Caucasian (87% vs. 78%). Consistent with their age, they represent more retirees (44% vs. 17%).
- **Travel Patterns:** This group often spends the night (72% vs. 72%) and for an average length of time (3.3 vs. 3.2 nights), with about half paying for lodging (48% vs. 50%). They spend more overall (\$673 vs. \$513), especially on gaming \$158 vs. \$78).
- **Activity Choices:** More often *gamble* (21% vs. 17%) and more often *sightsee* – both *urban sightseeing* (19% vs. 14%) and *rural sightseeing* (17% vs. 10%).

Executive Summary/Implications

Diverse characteristics appear by destination

Destinations may want to tailor their marketing messages to those they attract, as noted for these six Louisiana areas (top areas noted in beige):

Age

Alexandria	42
Baton Rouge	44
Lafayette	46
Lake Charles	50
New Orleans	44
Shreveport	47

Income

Alexandria	\$44,400
Baton Rouge	\$64,700
Lafayette	\$72,600
Lake Charles	\$57,600
New Orleans	\$74,500
Shreveport	\$62,300

Employed Full-Time

Alexandria	72%
Baton Rouge	56
Lafayette	62
Lake Charles	62
New Orleans	68
Shreveport	68

Retired

Alexandria	9%
Baton Rouge	19
Lafayette	15
Lake Charles	24
New Orleans	11
Shreveport	17

Married

Alexandria	65%
Baton Rouge	44
Lafayette	63
Lake Charles	55
New Orleans	53
Shreveport	68

% With Children

Alexandria	35%
Baton Rouge	34
Lafayette	40
Lake Charles	26
New Orleans	26
Shreveport	39

% African-American

Alexandria	25%
Baton Rouge	18
Lafayette	21
Lake Charles	12
New Orleans	19
Shreveport	17

% Louisiana Resident

Alexandria	61%
Baton Rouge	57
Lafayette	50
Lake Charles	34
New Orleans	25
Shreveport	28

Executive Summary/Implications

Travel choices also vary by destination

Destinations can align their marketing messages to fit with the travel patterns of their visitors (top areas noted in beige):

% VFR*

Alexandria	36%
Baton Rouge	46
Lafayette	56
Lake Charles	22
New Orleans	34
Shreveport	29

% O/N** and # Nights

Alexandria	69%	3.2
Baton Rouge	64	5.6
Lafayette	75	3.1
Lake Charles	66	3.8
New Orleans	85	3.7
Shreveport	73	2.6

% Travel in Pairs

Alexandria	48%
Baton Rouge	22
Lafayette	38
Lake Charles	35
New Orleans	32
Shreveport	44

% Drive Own Auto

Alexandria	75%
Baton Rouge	76
Lafayette	73
Lake Charles	80
New Orleans	56
Shreveport	78

Top Two Activities

Alexandria	Visit Relatives 40%; Shop 16%
Baton Rouge	Visit Relatives 27%; Shop 21%
Lafayette	Visit Relatives 43%; Shop/Visit Friends tie 20%
Lake Charles	Gaming 46%; Visit Relatives 20%
New Orleans	Urban Sightsee 28%; Shop/Dining tie 27%
Shreveport	Gaming 41%; Visit Relatives/Shop tie 19%

Spending in LA

Alexandria	\$269
Baton Rouge	\$400
Lafayette	\$404
Lake Charles	\$475
New Orleans	\$852
Shreveport	\$439

Satisfied*** with LA

Alexandria	73%
Baton Rouge	87
Lafayette	90
Lake Charles	77
New Orleans	89
Shreveport	75

*VFR: Visit Friends/Relatives (Primary Purpose)

** O/N: Overnight

*** Extremely/Very Satisfied

Executive Summary/Implications

Competition fiercest in, but not limited to, the South

- **Southerners Stay in the South, but Are Willing to Travel Beyond.** Not surprisingly, particularly in the current market, proximity continues to play a substantial role in destination choices. The top six destinations chosen by Louisiana visitors are all southern states (TX, FL, MS, AL, GA, TN); however, California, Nevada, Illinois, and New York also make the top twelve.
- Top cities (DMAs) visited reflect a similar pattern. New Orleans leads as the top city visited in the past three years, followed by other Southern areas: Dallas/Ft. Worth, Houston, Orlando, Atlanta, and San Antonio. Las Vegas, the top non-Southern DMA, ranks seventh.

Louisiana generates high levels of satisfaction

- **Across Geography and Segment, at least 8 in 10 are Satisfied with Louisiana.** Louisiana visitors rate the state highly, with those living in-state (88% extremely/ very satisfied) assigning higher “marks” than those in the High BDI Marketing Area (82%) or other visitors (85%).

Executive Summary/Implications

Assessment

- **Travel Begins to Recover in 2010.** US travel begins to climb and Louisiana visitation stabilizes. Unlike nearby Southern states, Louisiana attracts general US residents (aided by New Orleans) – beyond in-state and nearby (High BDI Marketing Area) residents. This creates an opportunity to openly market the state as a post-Katrina, post-Gulf Oil Spill, post-recession, fun place to visit.
- **Word of Mouth and Past Experience are Key to Future Growth.** Recommendations from friends and family, along with past experience, remain the most important sources of information about destinations, and can be difficult to leverage. Louisiana already enjoys strong satisfaction among visitors and needs to maintain this. Further, use of social media tools could help Louisiana “spread the word” among family and friends.
- **Local Visitors and Specialty Markets Are Important, But Long-Distance Travelers Boost Tourism Revenue.** Over a quarter of Louisiana visitors (28%) come from outside of the state and the High BDI marketing area. These people stay longer, pay for lodging, take advantage of more “tourist” activities, and as a result spend considerably more (\$921 vs. \$513) than the average visitor. New Orleans is the most successful area in attracting these visitors – perhaps other areas could entice those tourists to stay an extra day or two to explore their unique features as well.
- **Match Promotions to Activity Preferences in Key Source Markets.** Residents of bigger, but distant cities seek urban activities and often focus on *fine dining* and *urban sightseeing*, but some markets reveal different interests, such as *museums* for New Yorkers and *gaming* for those from Memphis and Atlanta. *Outdoor activities* appeal to Memphis residents, but few others.

Results of the Research



Visitor Volume and Origins

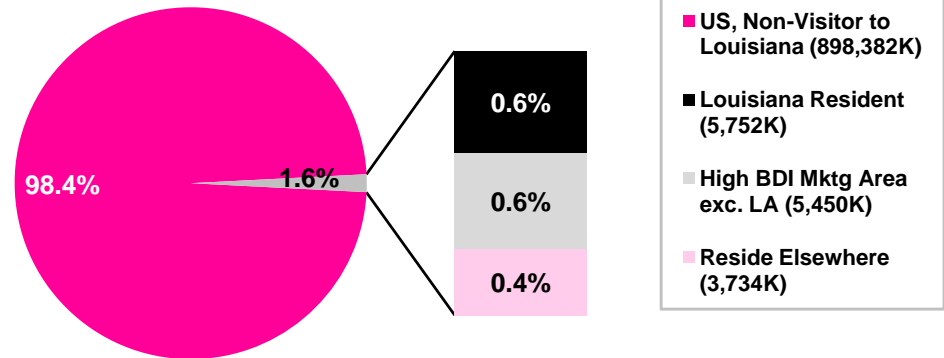


Overall volume of visitors to Louisiana

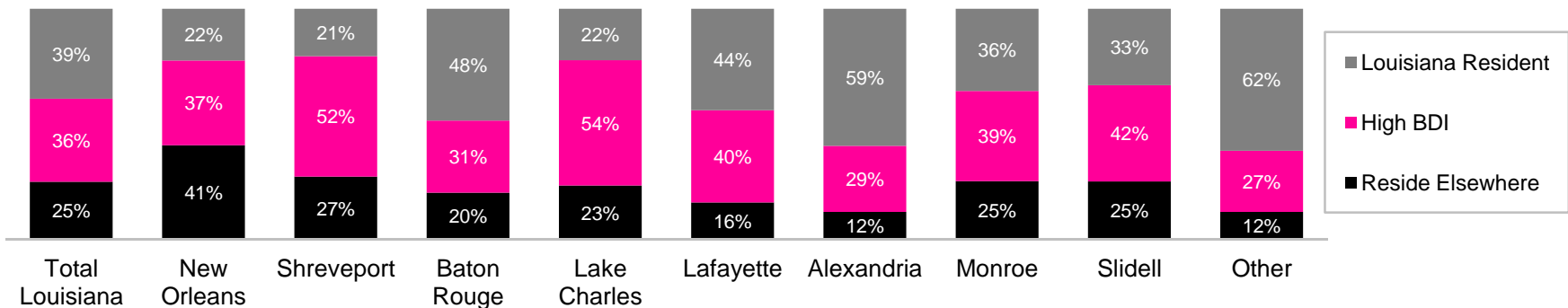
Market overview (person-trips): 2010 volume nearly matches 2009

- CY 2009 person-trips visits to Louisiana (14,936,000) nearly match the level of CY 2009 (14,988,000) while the Total US gained somewhat (7%; 913,318,000 from 852,967,000)
- Louisiana continues to draw more visitors from those most familiar with it – in-state residents and the High BDI Marketing Area
- New Orleans remains the most popular city and draws more visitors from the rest of the country (41%) than other Louisiana cities; further, its proportion of Louisiana visitation continues to rise (34% from 31% in 2009).

Projected Visitation – All US Trips (913,318,000)
Projected Visitation – All Louisiana Trips (14,936,000)



Louisiana Cities Visited by Residence (% of All Louisiana Visitors; Multiple Cities Allowed)



100%	34%	17%	15%	9%	13%	5%	4%	5%	21%	CY 2010
100%	31%	17%	18%	7%	9%	5%	4%	3%	25%	CY 2009
100%	27%	19%	17%	8%	14%	6%	6%	3%	24%	CY 2008

% of Total Louisiana Visitors (Person-Trips) Who Visit Each City

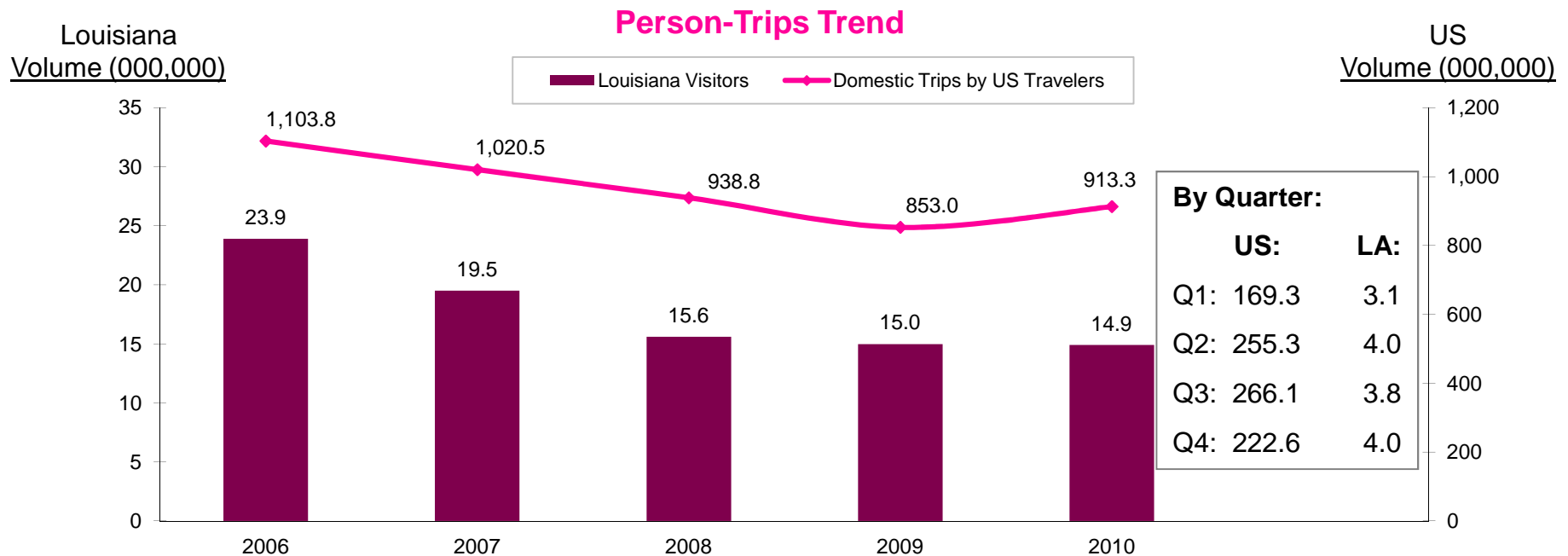


Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)
 Q4d. Please indicate the cities and/or places visited (Person Trips) (day or overnight trip)

Recent Louisiana volume compared to US

Louisiana's decline from prior years almost stops

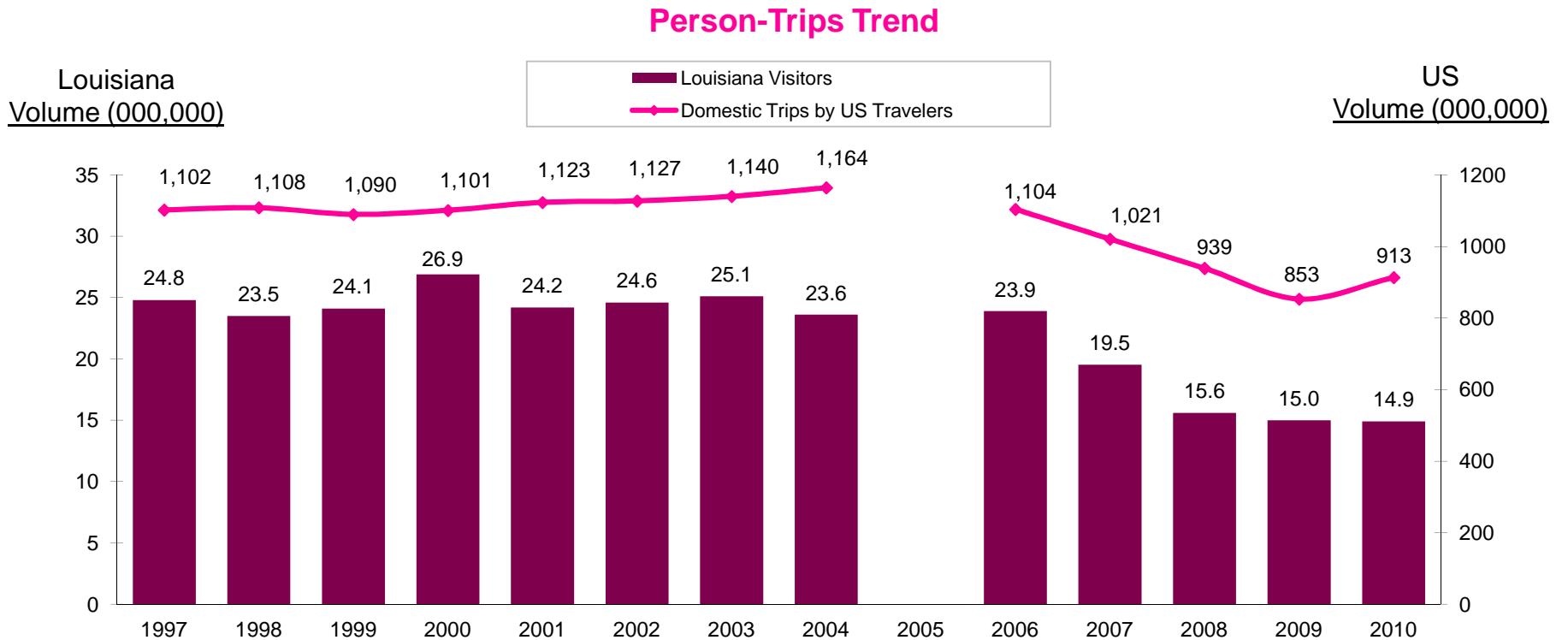
- Domestic trips by US travelers begin to reverse its steady decline since 2006
- Louisiana visitation stabilizes
- Unlike US travel, with most trips occurring in Q3 (July-September), Louisiana draws a large share of visitors in the shoulder seasons (April - June; October - December).



Louisiana's historical visitor volume

Longer trends

- The rapid decline in visitation to Louisiana stabilizes in 2010 while the US begins to recover.



Source: 1998 – 2004 = TIA



Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

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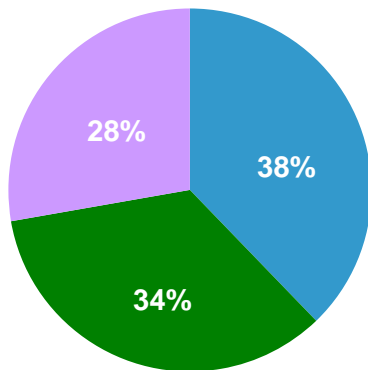
Relative size of key segments

Market relevance

- Out of 210 DMA areas, Louisiana hosts an above average number of visitors from 28 of those outside of Louisiana (Louisiana's High BDI Marketing Area, shown later)
- The greatest proportion of travel parties live in the state (38%) or the High BDI Marketing area (34%). The proportions from last year slip from the high BDI markets (34% from 39%), grow from outside the key areas (28% from 23%), and remain similar from in-state visitors (38% from 37%)
- The bulk of Louisiana visitors (38%) place in the 35-54 age category, with more visitors in the mature (34%) than in the younger segment (28%)
- By ethnicity, Louisiana hosts more than double the US average of African-Americans (16% vs. 7%), but the vast majority of visitors are still Caucasian (78%).

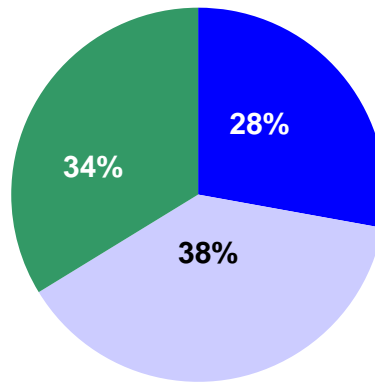
Proportion of Louisiana Visitors by Segment

By Source



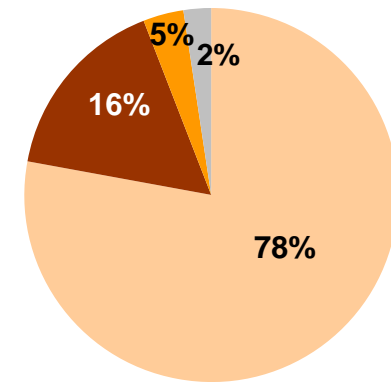
■ Louisiana ■ High BDI ■ Elsewhere

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA* ■ Hispanic ■ Other

* African-American

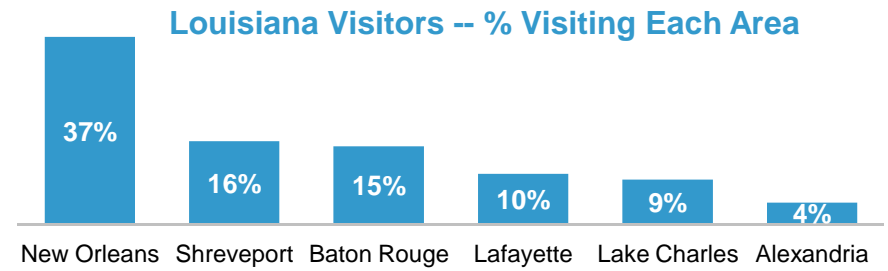
Caution: Note Small Sample (31) for Hispanics yields less reliable comparisons



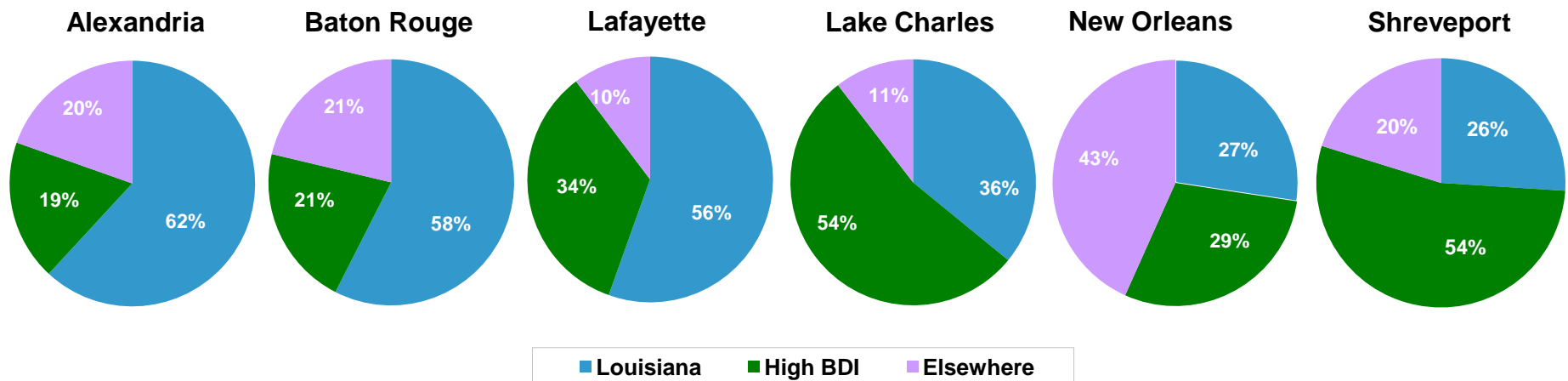
Source of visitors by Louisiana destinations

Market relevance

- More than a third (37%) of Louisiana visitors stop in New Orleans; Shreveport and Baton Rouge battle for second place
- The source of visitors to each area varies widely:
 - Alexandria, Baton Rouge, and Lafayette depend more heavily on locals (LA residents)
 - Lake Charles and Shreveport attract the largest share of High BDI residents
 - New Orleans draws from everywhere and claims the largest share of more distant ("elsewhere") visitors.



Proportion of Louisiana Visitors to Destination by Source

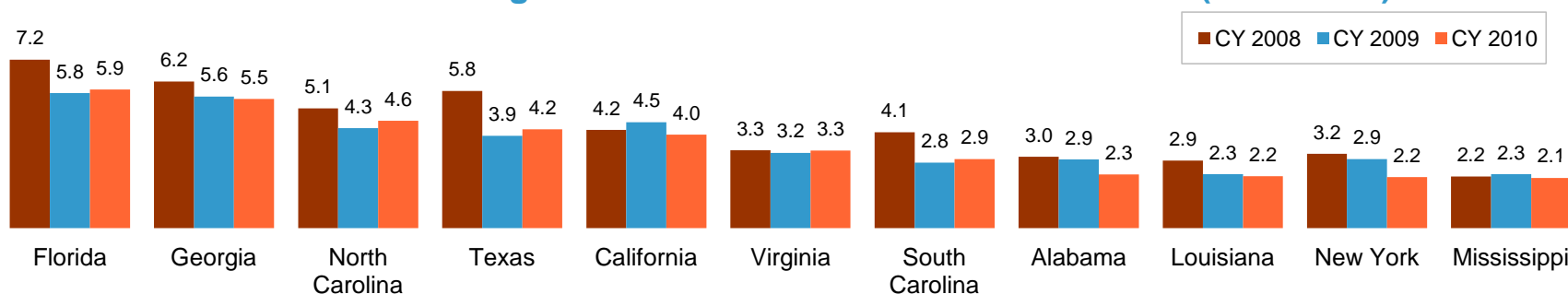


African-Americans visitors

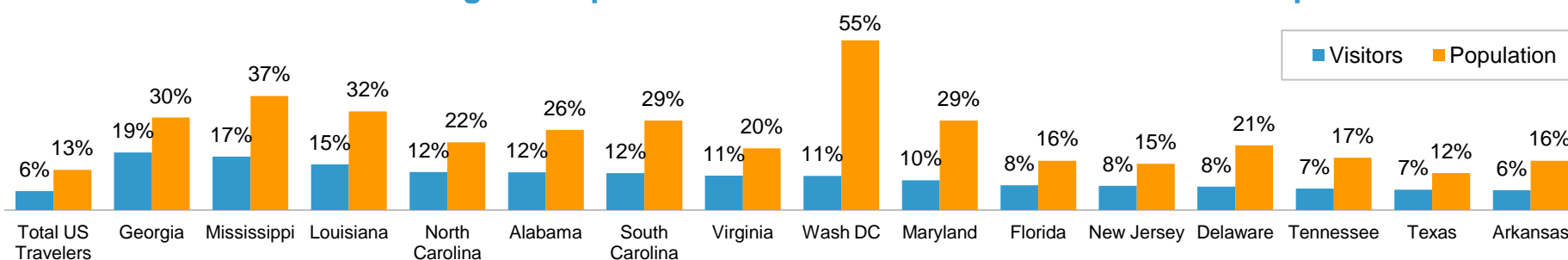
African-Americans travel less to most states

- Florida and Georgia enjoy the greatest number of African-American visitors
- A few states grow the number of African-American visitors in 2010 – notably North Carolina and Texas, while the numbers slip in California, Alabama, and New York
- In terms of proportion of visitors, Georgia remains at the top (19%; 18% last year) while Mississippi (17%) and Louisiana (15%) continue to vie for the second spot.

States With the Largest Number of African-American Visitors (in millions)



States with the Largest Proportion of African-Americans: Visitors and Population



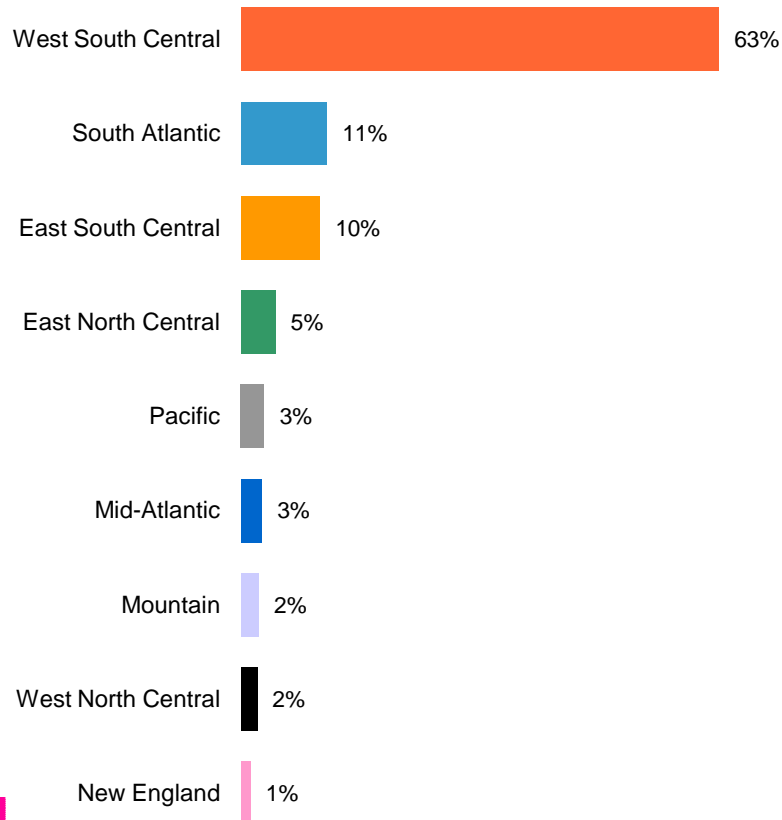
Visitors residence

Most visitors live in-state or in nearby states

- Louisiana continues to source two-thirds of its visitors from the West South Central census region, driven primarily by Louisiana (36%) and Texas (25%)
- Mississippi (6%, East South Central) and Florida (4%, South Atlantic) tie for third among Louisiana's sources.

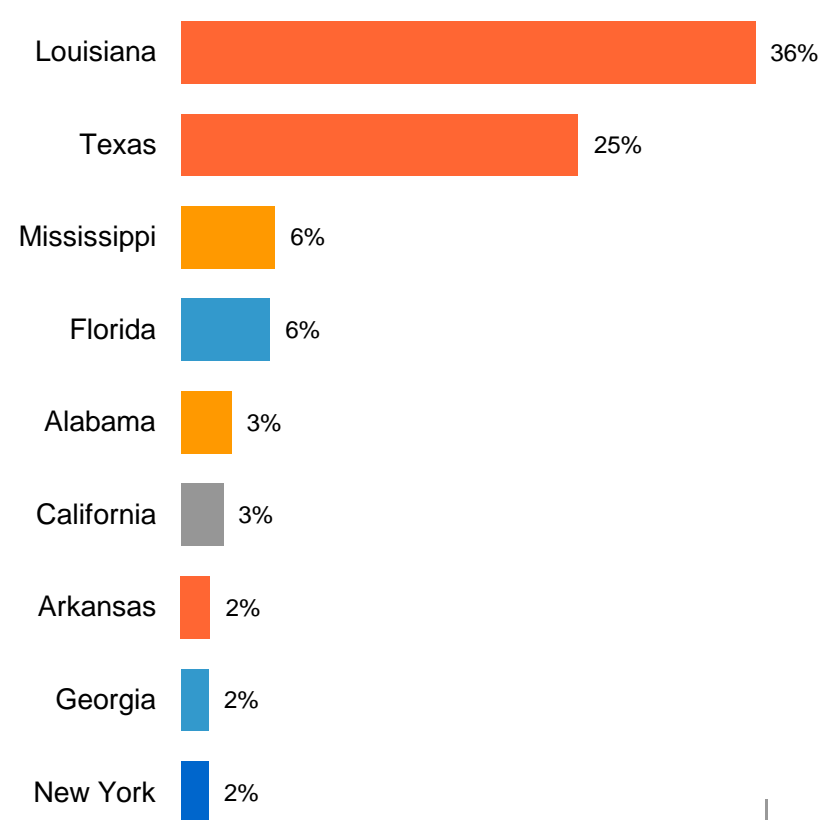
Source of Louisiana Visitors: Census Region

Base: Louisiana Visitors



Source of Louisiana Visitors: Top States

Base: Louisiana Visitors



Geography (Census Region State Composition)

States within regions shown – this is useful as a reference for the prior slide.

New England	Mid Atlantic	South Atlantic	East South Central	West South Central	East North Central	West North Central	Mountain	Pacific
CT	NJ	DL	AL	AR	IL	IA	AZ	CA
ME	NY	DC	KY	LA	IN	KS	CO	OR
MA	PA	FL	MS	OK	MI	MN	ID	WA
NH		GA	TN	TX	OH	MO	MT	
RI		MD			WI	NE	NV	
VT		NC				ND	NM	
		SC				SD	UT	
		VA					WY	
		WV						

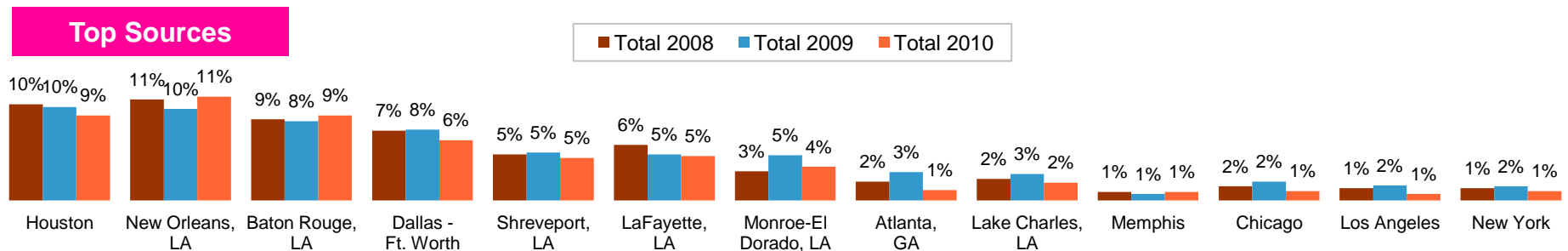
Louisiana visitor residence and trip purpose

Louisiana visitors often live in large, proximal DMAs

- Residents of Houston, Baton Rouge, and New Orleans send larger shares of their visitors to Louisiana
- Los Angeles, Chicago, and Atlanta visitors more often travel to Louisiana on business than those from other DMAs.

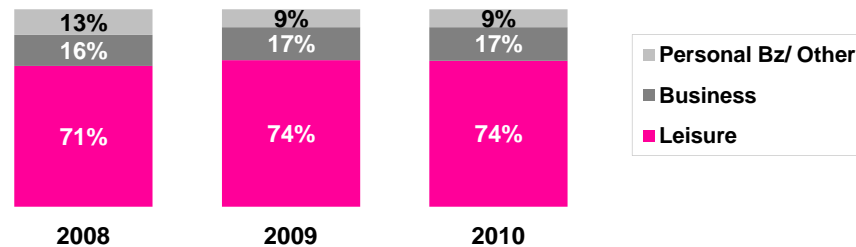
Top Sources of Louisiana Visitors by DMA (3%+ or Focus)

Base: Louisiana Visitors

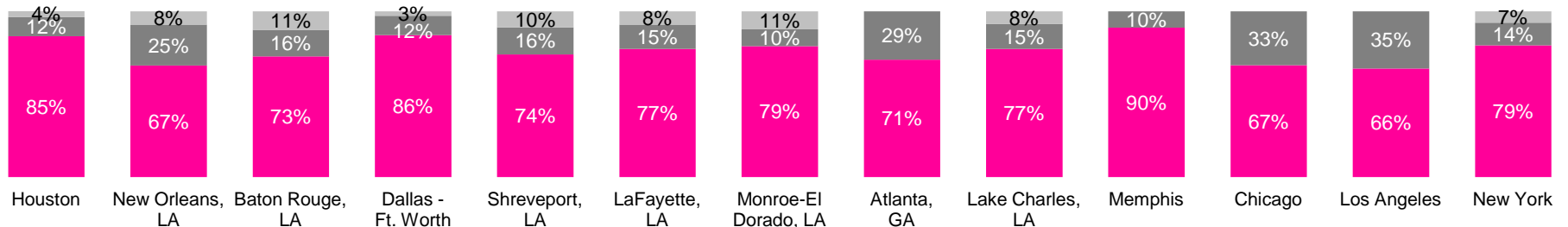


Purpose of Trip

Base: Louisiana Visitors



Source By Purpose



Louisiana's Business Development Index – Top 15

Louisiana's High BDI Marketing Area

- Louisiana attracts the largest proportion of residents from nearby Mississippi and Texas DMAs
- Overall, 28 DMA areas show above average (index exceeds 100) likelihood to visit Louisiana; the top 15 are shown at right
- The Business Development Index is calculated for each DMA. It measures the propensity of residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Biloxi-Gulfport, MS residents represent 0.107% of all US residents, but 2.297% of total Louisiana visitors. Those proportions $2.297/0.107 \times 100$ yield a BDI index value of 2153
- A list of the 50 highest BDI DMAs for Louisiana are listed in the Appendix at the end of the report.

Louisiana High BDI Index

DMA of Origin	High BDI Index
Biloxi-Gulfport, MS	2153
Tyler-Longview (Lufkin & Nacogdoches), TX	1027
Abilene-Sweetwater, TX	887
Beaumont-Port Arthur, TX	879
Jackson, MS	808
Hattiesburg-Laurel, MS	724
Mobile-Pensacola (Ft. Walton Beach), AL-FL	488
Greenwood-Greenville, MS	356
Houston, TX	346
Waco-Temple-Bryan, TX	336
Victoria, TX	330
Corpus Christi, TX	316
Montgomery-Selma, AL	269
Orlando-Daytona Beach-Melbourne, FL	246
Dallas-Ft. Worth, TX	234

Visitor Demographics

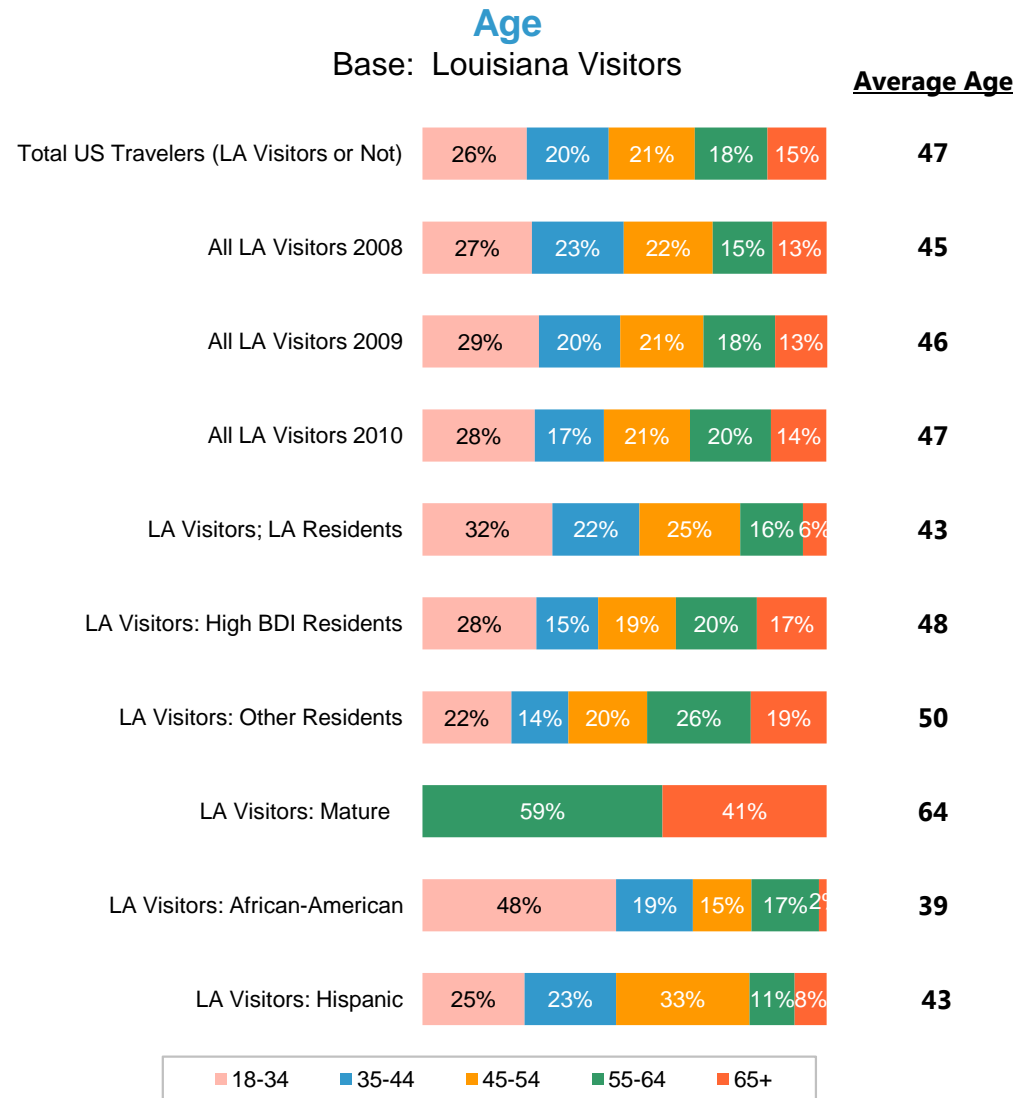


Visitor age

Age varies somewhat by segment

Although they are getting older over time, Louisiana visitors continue to match other US travelers in age (47). Further:

- Also mirroring prior years, the youngest visitors continue to be African-American (39) and those who live in the state (43), joined by Hispanics this year (43)
- The Mature market (64) is older, by definition, and visitors who live outside the state of Louisiana are also somewhat older (48-50) than the average visitor.

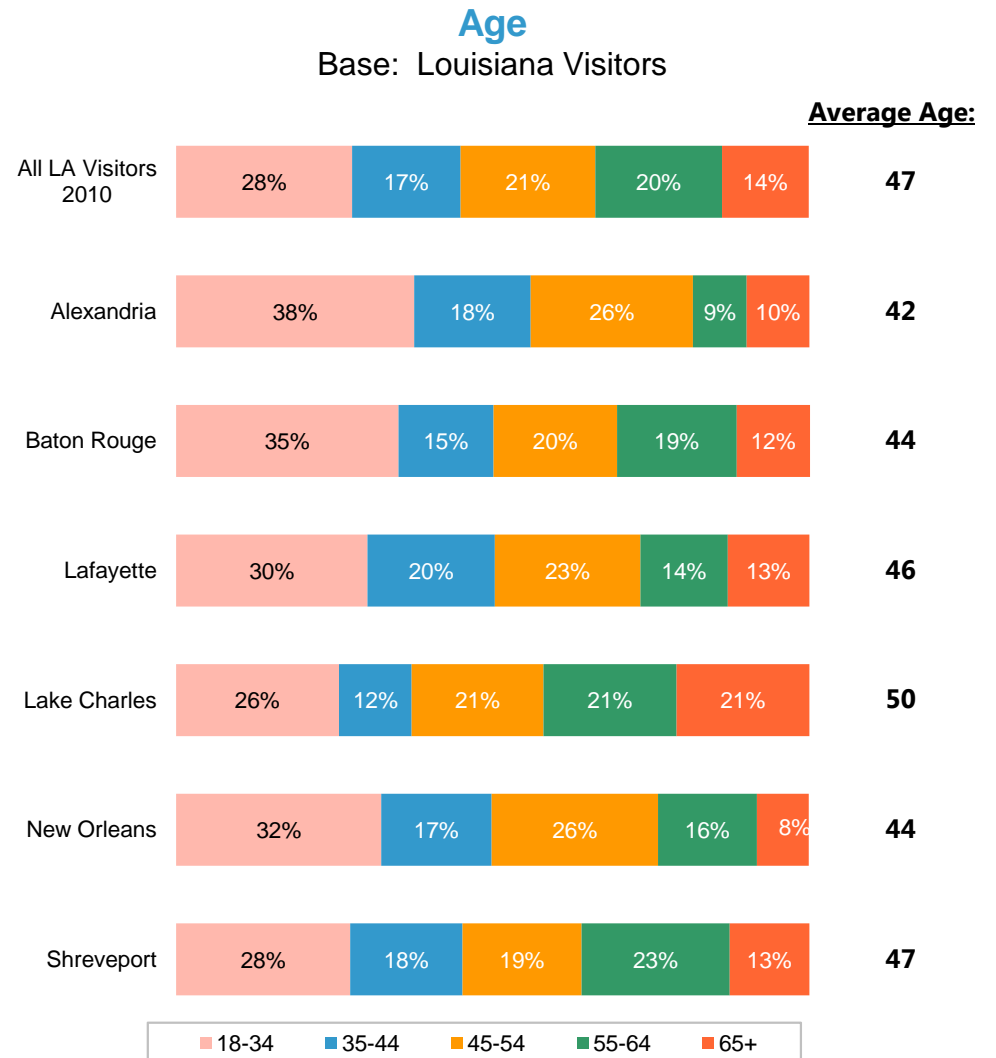


Visitor age by destination

Age varies somewhat by destination

While Louisiana visitors, in general, fall into similar age groups as total US travelers, destinations vary considerably:

- Lake Charles and Shreveport attract the oldest visitors, who also note greater participation in gaming (shown later)
- Younger visitors choose Alexandria, New Orleans, and Baton Rouge.

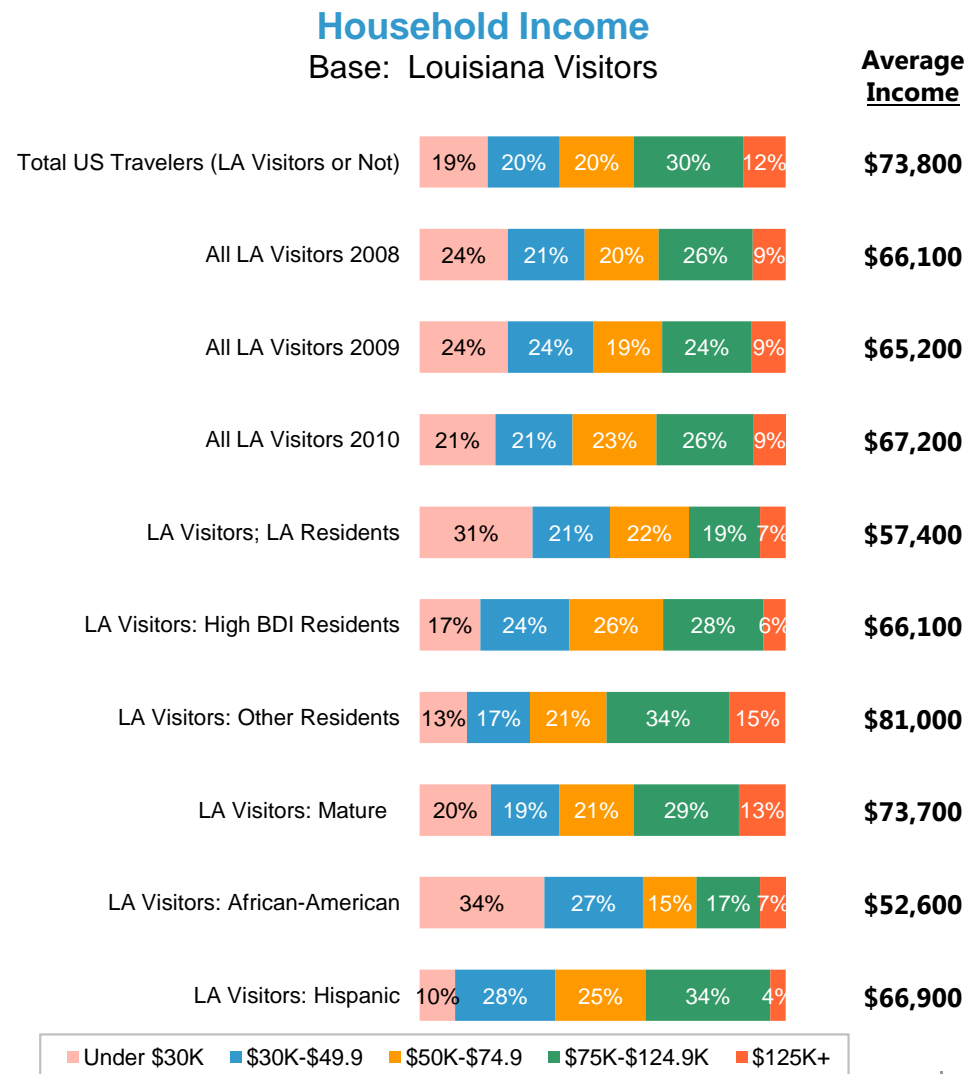


Visitor income

Income varies widely by segment, but remains near last year

Louisiana visitors report somewhat higher incomes in 2010 than in 2009 (\$67,200 vs. \$65,200), but continue to lag typical US travelers (\$73,800). In addition:

- Not surprisingly, those traveling the farthest (reside outside of Louisiana and the High BDI Marketing Area) and thus incurring the greatest travel costs, report the highest incomes (\$81,000); residents in the High BDI Marketing Area place between these and in-state travelers (\$66,100)
- In-state visitors and African Americans rank last at \$57,400 and \$52,600 respectively
- Mature visitors' incomes (\$73,700) exceed the Louisiana average.

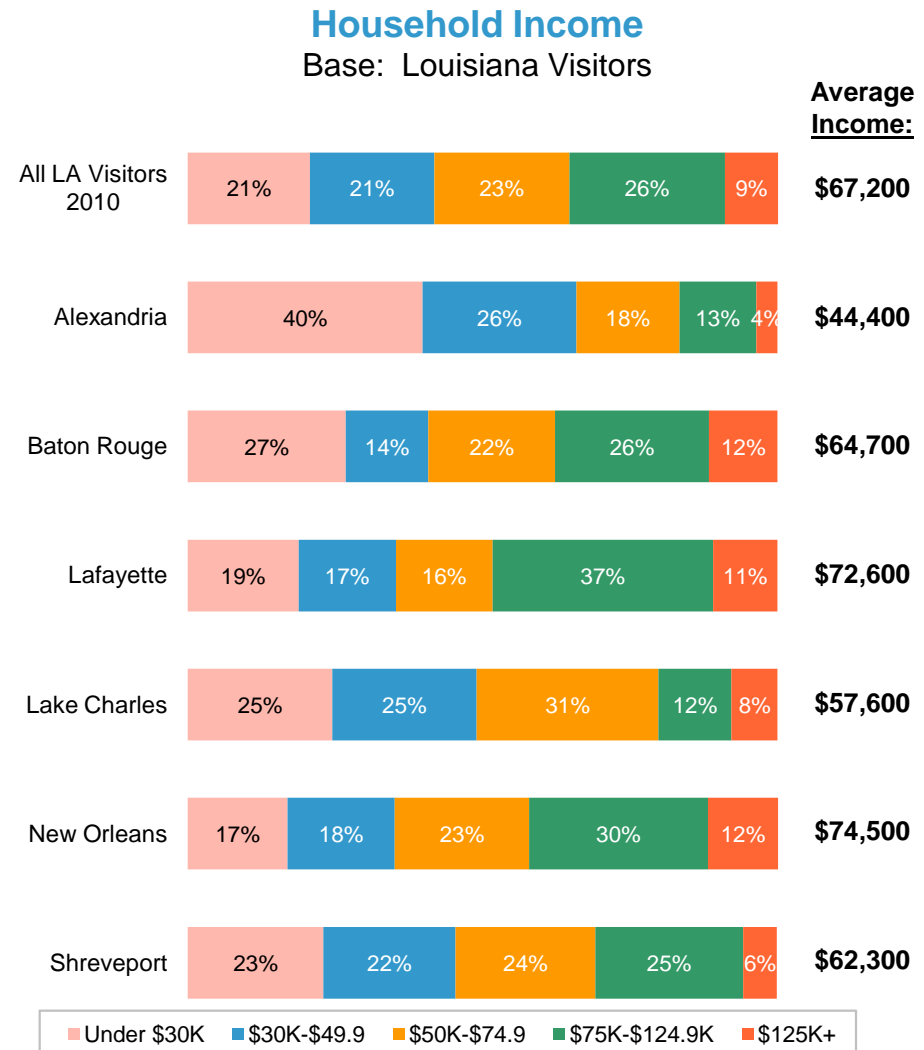


Visitor income by destination

Income varies by destination

While Louisiana visitors' incomes lag typical US travelers, some destinations draw more affluent visitors than others:

- New Orleans attracts more affluent visitors, exceeding the average US traveler (\$74,500 vs. \$73,800) as well as the average Louisiana visitor (\$67,200)
- Lafayette ranks second
- Alexandria visitors earn less than visitors to other areas.



Louisiana visitor characteristics

Characteristics vary by segment, but generally reflect US travel patterns

- The greatest difference between Louisiana visitors and total US travelers occurs in ethnicity: 16% of Louisiana visitors are African-American, more than twice the national average (6%), with similar results for Louisiana visitors living in-state (18%) or residing in High BDI markets (17%)
- The lowest marriage rate appears among African-American (37%); the highest among Hispanics (74%)
- Hispanic (47%) visitors most often live with children
- African-American visitors are most likely to live alone (31%), Hispanics least likely (11%)
- Most matures are married (63%) and half live with just one other person (50%).

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic
% Male	39%	41%	36%	42%	47%	50%	25%	29%
% Married	60	59	55	63	59	63	37	74
Household Composition								
% One Person	21%	23%	25%	19%	27%	26%	31%	11%
% Two People	36	34	27	34	42	50	30	30
% Three or More	43	43	48	47	32	24	40	59
% With Children < 18	33	32	38	36	20	7	32	47
Ethnicity								
% Caucasian	87%	78%	78%	77%	79%	87%	-	70%
% African-American	6	16	18	17	12	9	100	8
% Hispanic	4	4	4	3	4	2	2	100



QE: Please indicate your gender.

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level-demo wtd)

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Louisiana visitor patterns – continued

Characteristics vary by segment

- Most Louisiana visitor groups place near the national full time employment average (64%) except for those in the Mature group, where almost half have retired
- Fewer in-state Louisiana visitors have college degrees (35%) than other segments while those who live the farthest away (“From Elsewhere”) indicate above average formal education (56%)
- Those traveling greater distances (“From Elsewhere”) are more likely than others to classify as Future Shapers/Makers (38%), along with both ethnic groups
- In contrast, the Mature group more often qualifies as Yesterday/ Yesteryear consumers.

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
FutureView								
% Shapers/Makers	31%	33%	30%	31%	41%	27%	41%	52%
% Today Consumers	40	38	40	37	36	35	37	18
% Yesterday/Yesteryear	27	27	28	30	23	37	17	28
Employment								
% Full Time	64%	64%	68%	61%	64%	41%	58%	72%
% Retired	16	17	11	19	23	44	11	15
% Other	20	19	21	20	13	15	31	13
Education								
% < 4 yr College Grad	52%	54%	64%	52%	42%	52%	55%	58%
% 4 yr College Grad +	47	45	35	46	56	47	43	37

Louisiana visitor characteristics by destination

Characteristics often vary from total Louisiana visitors (summary):

- Alexandria visitors: Youngest, lowest average income, slightly more often live with children, highest proportion with African-American heritage, fewer with college degrees
- Baton Rouge visitors: Slightly younger, fewer are married, and most likely visitors to live alone
- Lafayette visitors: Average age, higher incomes, often married, least likely to live alone, above average with African-American heritage
- Lake Charles: Oldest, most retirees, lower incomes, often live alone, most Caucasians
- New Orleans: Younger, highest incomes and education, fewer with children
- Shreveport: Average age, moderate incomes, older, somewhat lower incomes, often live with children.

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
% Male	39%	41%	53%	26%	31%	40%	38%	38%
% Married	60	59	65	44	63	55	53	68
Household Composition								
% One Person	21%	23%	23%	37%	14%	32%	28%	17%
% Two People	36	34	37	21	35	27	37	38
% Three or More	43	43	40	42	52	41	35	46
% With Children < 18	33	32	35	34	40	26	26	39
Ethnicity								
% Caucasian	87%	78%	55%	80%	75%	87%	73%	79%
% African-American	6	16	25	18	21	12	19	17
% Hispanic	4	4	6	5	4	6	4	4

Louisiana visitor patterns by destination – continued

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
FutureView								
% Shapers/Makers	31%	33%	40%	32%	38%	36%	42%	36%
% Today Consumers	40	38	33	30	39	34	37	36
% Yesterday/Yesteryear	27	27	24	32	20	30	20	28
Employment								
% Full Time	64%	64%	72%	56%	62%	62%	68%	68%
% Retired	16	17	9	19	15	24	11	17
% Other	20	19	19	25	23	14	21	15
Education								
% < 4 yr College Grad	52%	54%	76%	45%	54%	67%	46%	60%
% 4 yr College Grad +	47	45	18	53	45	33	54	41

Trip Characteristics and Satisfaction

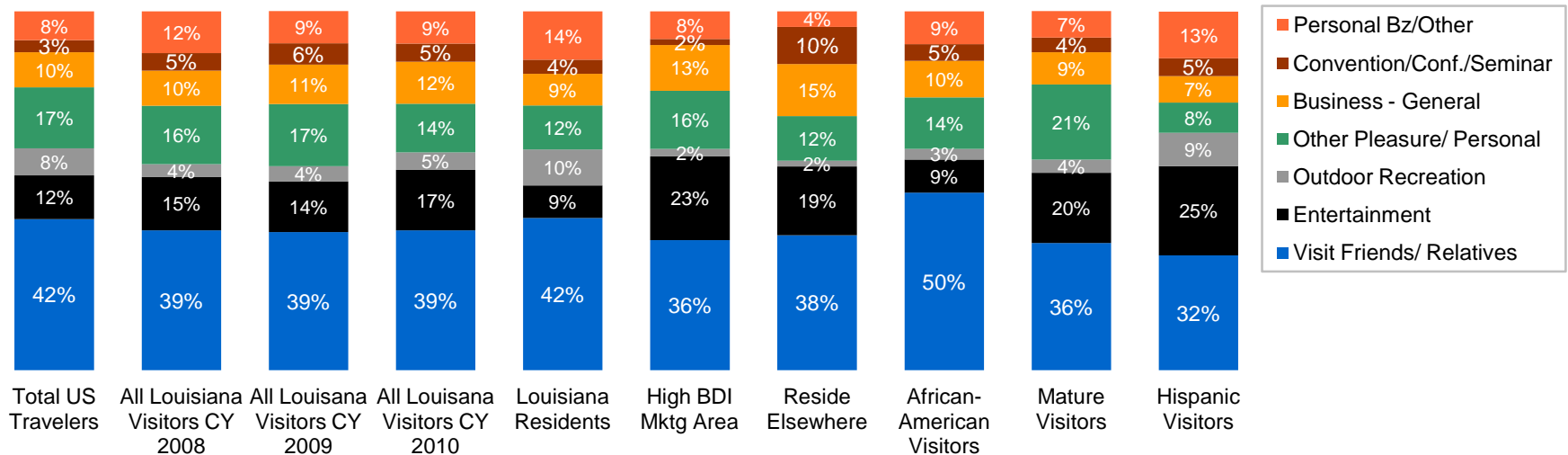


Trip purpose

Visitors usually come to Louisiana for fun

- Most visitors primarily come to Louisiana to *visit friends and family* (39%), matching last year and similar to Total US Travelers; African-American visitors, especially, come for that purpose (50%)
- Mature visitors, Hispanics, and those residing out-of-state (either the High BDI marketing area or Elsewhere) cite *entertainment* as their reason for visiting more often than average
- Business* travel, while still a relatively small percentage, is more prevalent among those who reside farther away (“Reside Elsewhere”) and is relatively stable (25% in both 2010 and 2009) within that group.

Primary Purpose of Trip



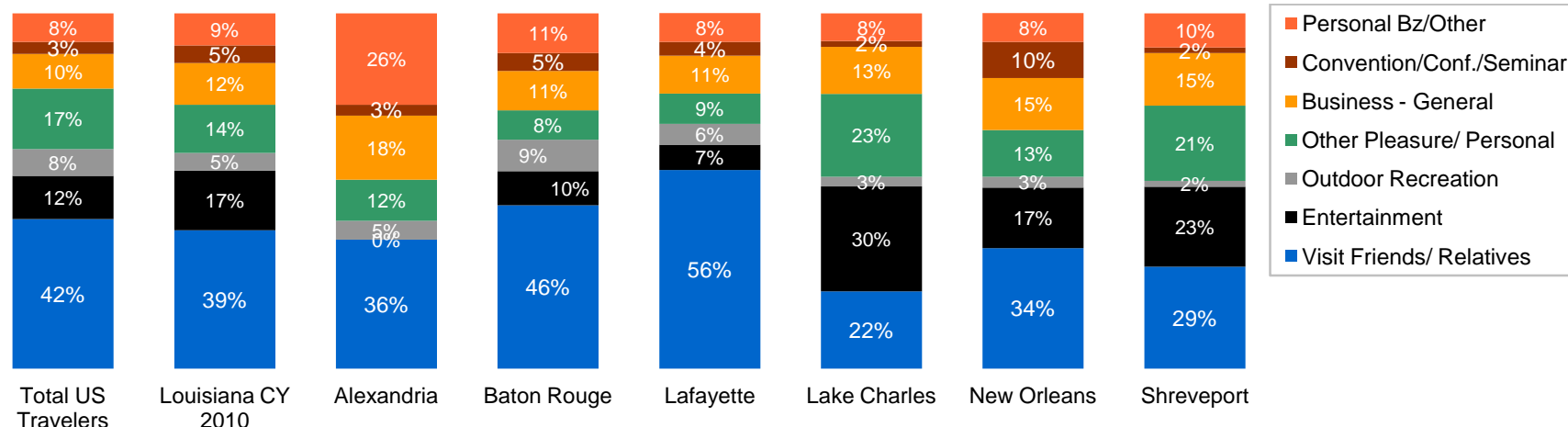
79%	74%	74%	74%	74%	78%	71%	76%	80%	75% = Net Leisure
13%	15%	17%	17%	13%	14%	25%	15%	13%	12% = Net Business

Trip purpose by destination

Visitors usually come to Louisiana for fun

- *Business* visits occur more often in New Orleans, especially *conventions*, than elsewhere
- *Gaming* participation (shown later) ranks highest in Shreveport and Lake Charles; both lead in *entertainment* as well
- Tourism in Baton Rouge and Lafayette relies more heavily on *visits to friends and family* than other Louisiana areas.

Primary Purpose of Trip



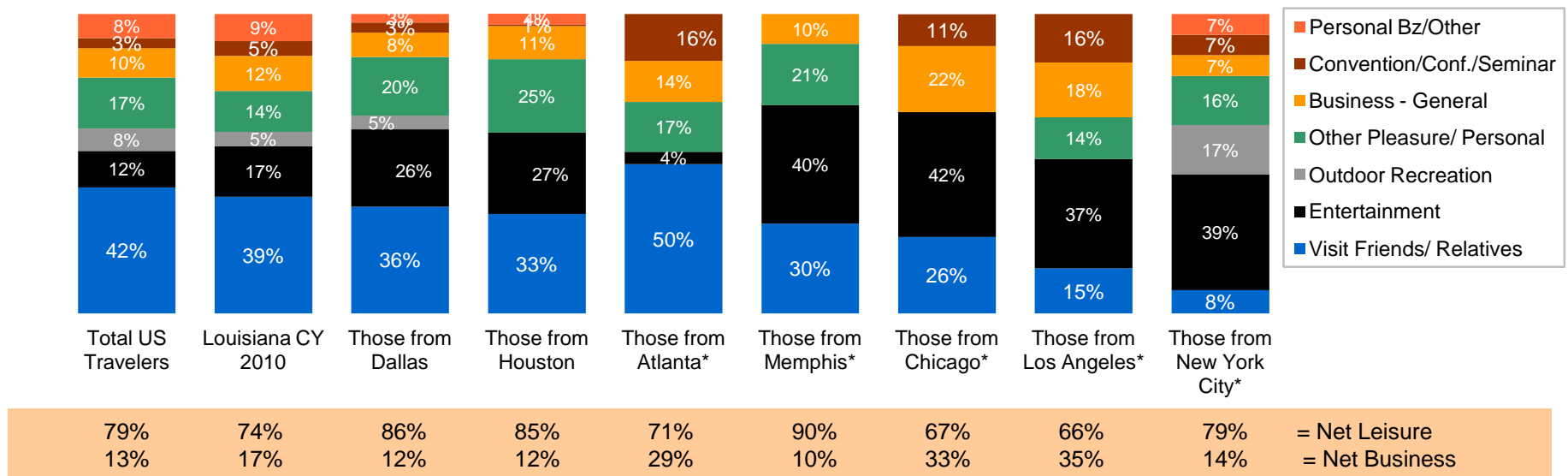
79%	74%	53%	73%	77%	77%	67%	74%	= Net Leisure
13%	17%	21%	16%	15%	15%	25%	16%	= Net Business

Trip purpose by visitor source

Visitors usually come to Louisiana for fun

- Travelers from distant, larger cities often come for business reasons
- Houston, Memphis, and New York City visitors more often have leisure plans than others
- Caution: Very small sample for Atlanta, Memphis, Chicago, Los Angeles, and New York City.

Primary Purpose of Trip



* Caution: Very small base size n<20

Purpose and accommodations

Visitors often see friends and relatives and stay with them

- Compared to business travelers, leisure travelers more often: drive, stay with friends/relatives, and travel with children
- Not surprisingly, business travelers fly more frequently, stay longer, and usually pay for lodging (hotel/motel)
- About a third of business visitors fly (32%) – almost three times the rate of leisure visitors
- Leisure travelers more often live in-state (35%) than business travelers (29%) (not shown).

LOUISIANA VISITORS Trip Choices (Trip Level)	Total 2008	Total 2009	Total 2010	Leisure	Business
PRIMARY TRIP PURPOSE					
NET Leisure/Personal	74%	74%	74%	100%	-
Visit Friends/Relatives	39	39	39	52	-
Entertainment/Sightsee	15	14	17	23	-
NET Business	15	17	17	-	100
Personal Bs/Other	12	9	9	-	-
PRIMARY MODE					
% Own Auto/Truck	74%	73%	70%	76%	45%
% Air Travel	14	15	15	12	32
AVG # IN TRAVEL PARTY	2.8	2.8	2.9	3.1	1.5
% Traveling Solo	28%	28%	28%	20%	62%
% Traveling With Children	26	24	23	28	5

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

LOUISIANA VISITORS Lodging (State Level)	Total 2008	Total 2009	Total 2010	Leisure	Business
AVG # NIGHTS (if any)	3.1	3.0	3.2	3.1	4.1
Private Home	1.4	1.1	1.2	1.5	0.2
Hotel/Motel	1.3	1.4	1.6	1.2	3.7
All Other	0.2	0.3	0.2	0.2	0.1

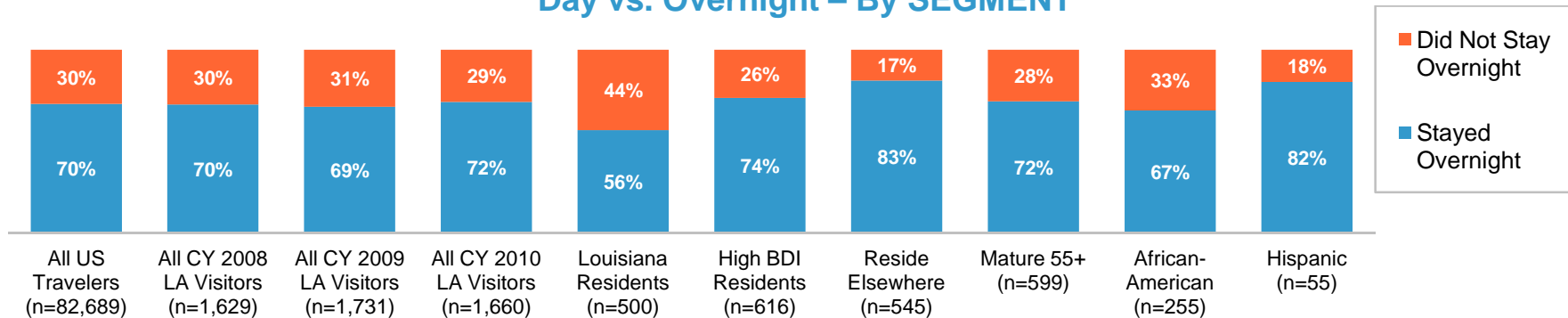
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

Overnight stays

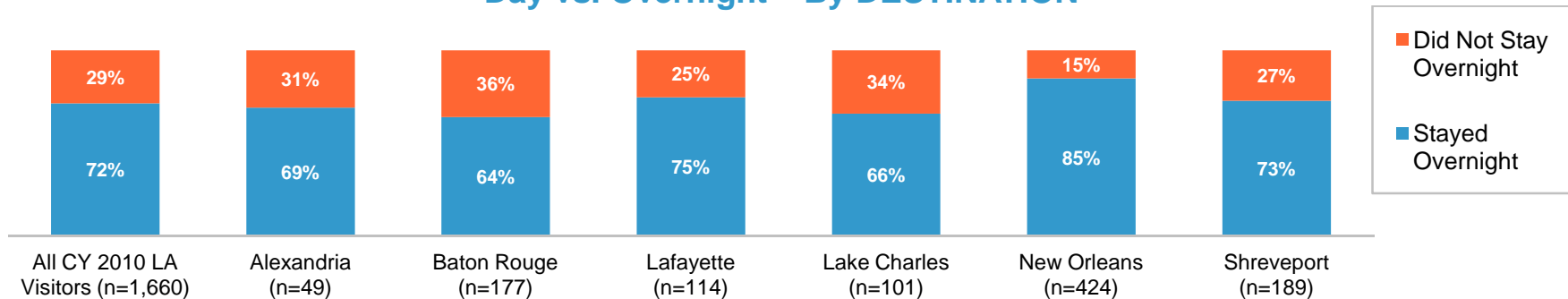
Most visitors spend at least one night, unless they live in-state

- 7 in 10 Louisiana visitors stay overnight, at parity with other US travelers and last year
- Logically, those who live in-state are most likely to take a day-trip (44%); conversely, those who travel the greatest distance are most likely to stay overnight (83%)
- As might be expected among the cities, New Orleans visitors most often spend the night (85%)
- Expect for Louisiana residents, African-Americans more often visit just for the day (33%) than others.

Day vs. Overnight – By SEGMENT



Day vs. Overnight – By DESTINATION

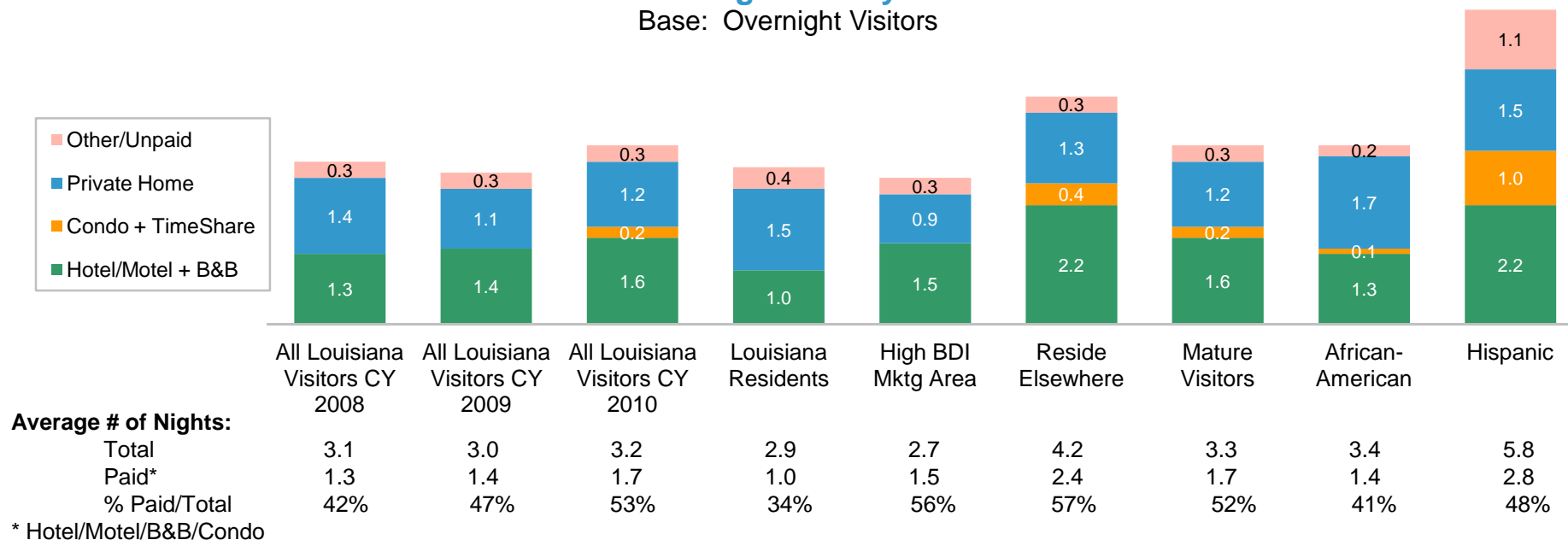


Accommodations by segment

About half (53%) pay for accommodations

- The largest share of Louisiana visitors come to see friends/family and many stay with them rather than in hotels/motels/B&Bs/condos
- As shown previously, Louisiana residents are least likely to take an overnight trip in Louisiana; even when they do, they spend relatively few of those nights (34%) in paid accommodations
- Those traveling farthest, living outside of Louisiana and the High BDI marketing area, stay the longest (4.2 nights) and more often opt for hotels/motels
- African-Americans stay in a private home more nights than any other segment; Hispanics tend to stay the longest.

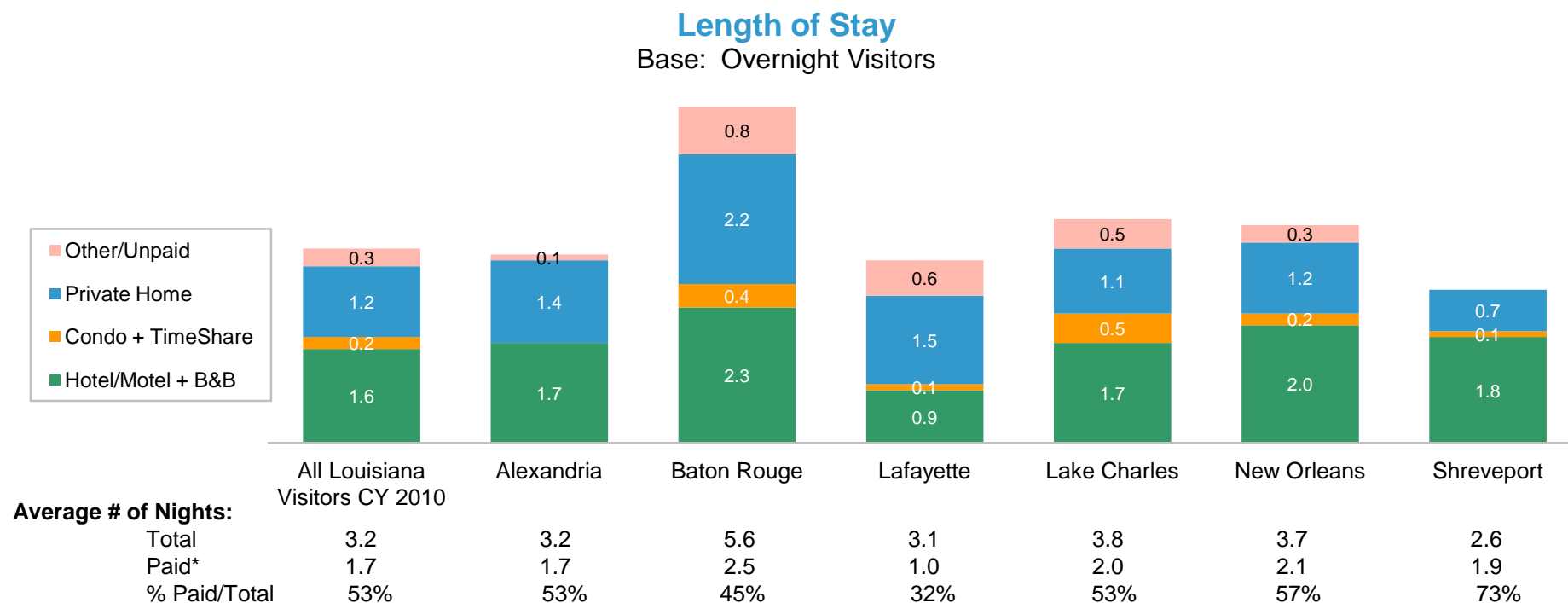
Length of Stay
Base: Overnight Visitors



Accommodations by destination

Visitors stay longer in Baton Rouge, Lake Charles, and New Orleans

- Not only does New Orleans attract more overnights (earlier slide), but they stay longer and more often opt for hotels than average
- Consistent with the purpose of trip (more who visit friends and relatives), Baton Rouge and Lafayette guests more often stay in private homes.



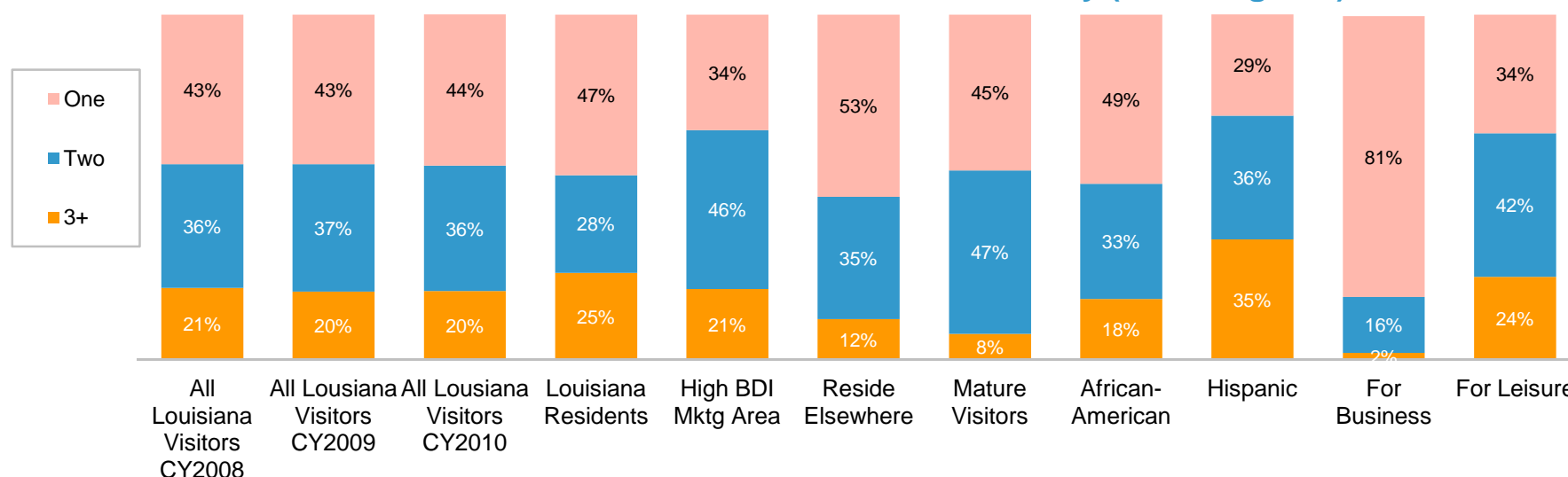
* Hotel/Motel/B&B/Condo

Travel companions by segment

Visitors often travel solo or in pairs*

- About one in four travel parties (24%) include children
- Not surprisingly, business travelers (81%) most often travel alone, followed by those living outside of the High BDI area (53%) who, as shown earlier, also tend to be heavier business travelers
- Mature visitors also tend toward smaller travel parties, only 8% travel in groups of 3 or more
- Hispanics least often travel solo (29%) and are the most likely to travel as a family (38%).

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:

Total	1.9	2.0	1.9	2.0	2.0	1.7	1.7	1.8	2.2	1.2	2.1
% w/Children	23%	20%	20%	24%	22%	10%	3%	20%	38%	4%	24%

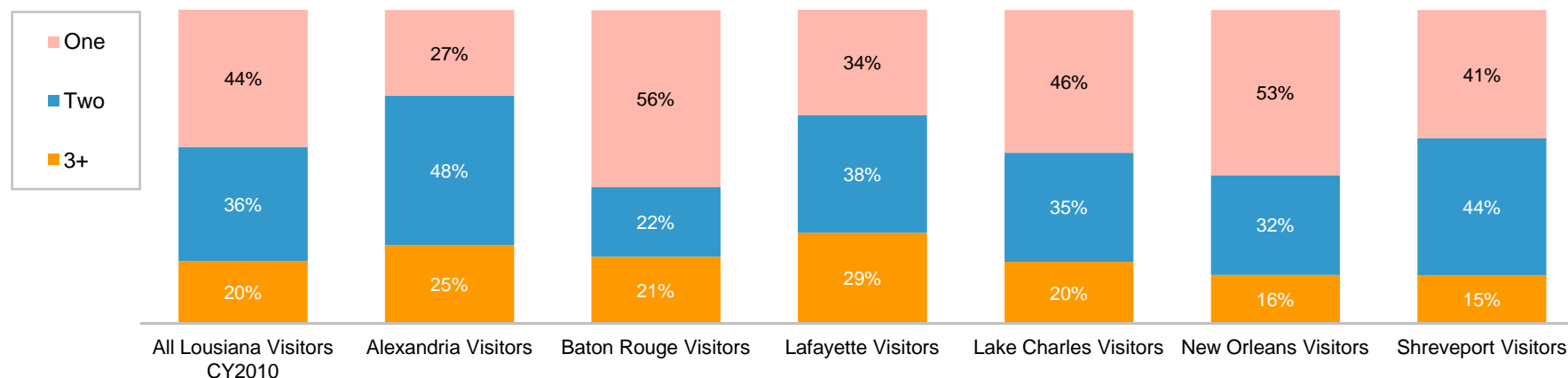
*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."

Travel companions by destination

New Orleans draws the fewest families with children

- More family traveler groups (with children) go to destinations where the primary purpose is to visit friends and relatives, especially Alexandria and Lafayette
- New Orleans tends to attract adults who, as shown later, indicate greater interest in history/museums, urban sightseeing, nightlife/dining, and special events
- Lake Charles and Shreveport also have relatively low appeal to families and both attract a larger share of visitors who cite gaming as one of their activities.

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:

Total	1.9	2.1	1.8	2.3	1.9	1.8	1.9
% w/Children	20%	34%	19%	32%	20%	14%	17%

*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."

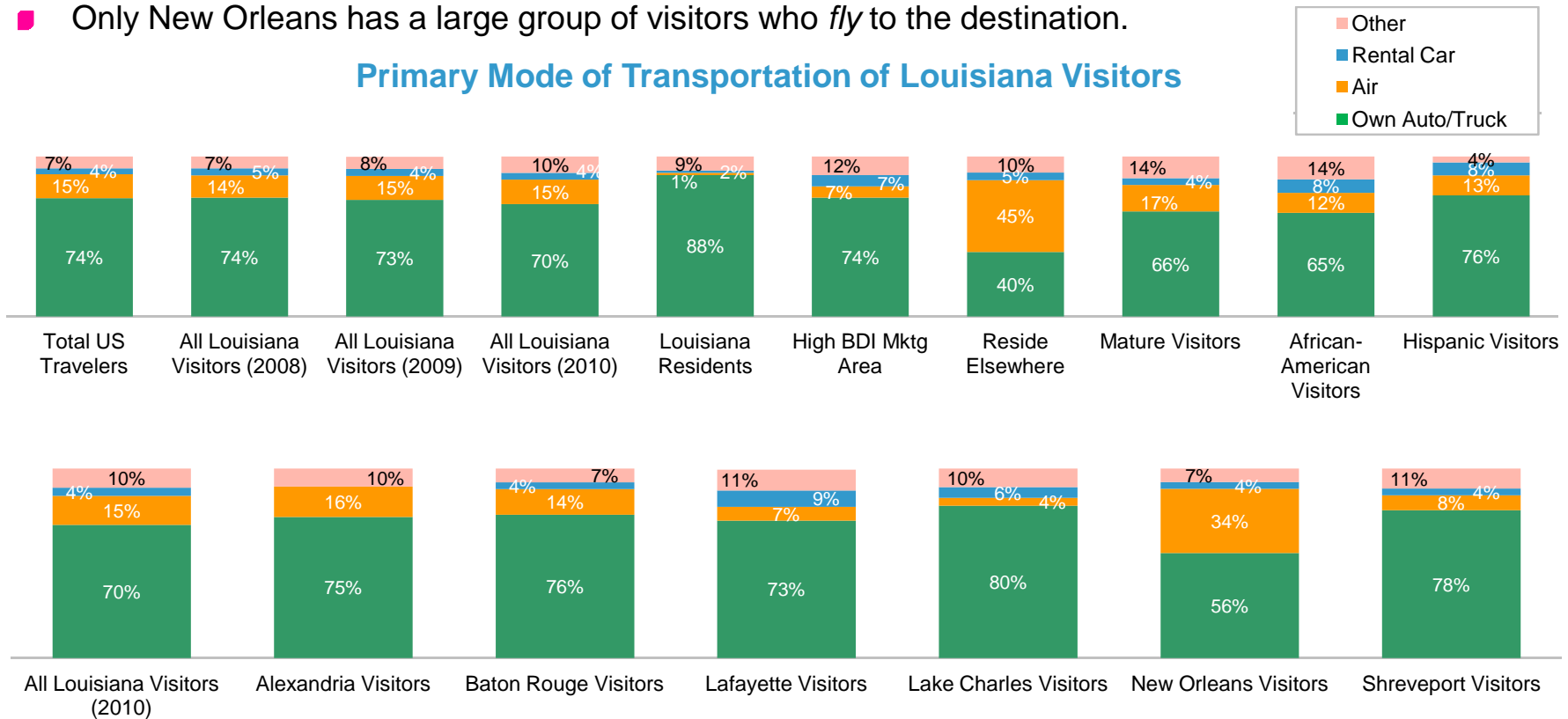
Primary mode of transportation

Most travelers drive to their destination

Although overall Louisiana visitors choose transportation modes similar to total US travelers, distance notably affects transportation choice:

- As expected, Louisiana residents *drive* more often to in-state destinations than any other segment
- Conversely, residents outside both the state and the High BDI Marketing Area *fly* most often
- As noted last year, African-Americans *rent a car* to visit Louisiana more often than most others
- Only New Orleans has a large group of visitors who *fly* to the destination.

Primary Mode of Transportation of Louisiana Visitors

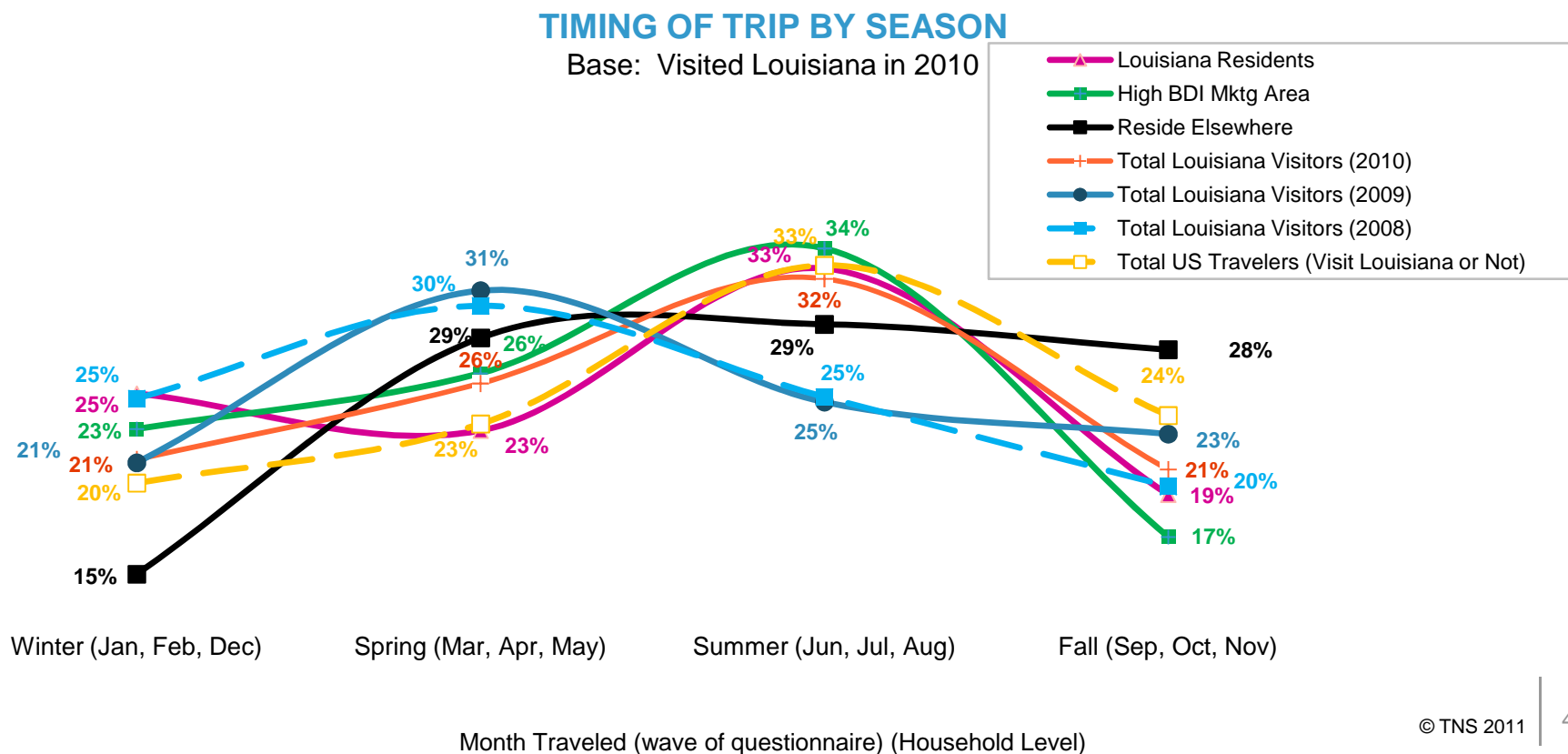


Trip timing

Nationally, most travel occurs in Summer

In contrast to prior years when Spring led other seasons:

- 2010 Louisiana travel peaks in the Summer for both Louisiana residents and the High BDI Marketing Area
- However, those traveling from “Elsewhere” come at about the same rate from Spring through Fall; only the Winter shows a dip.

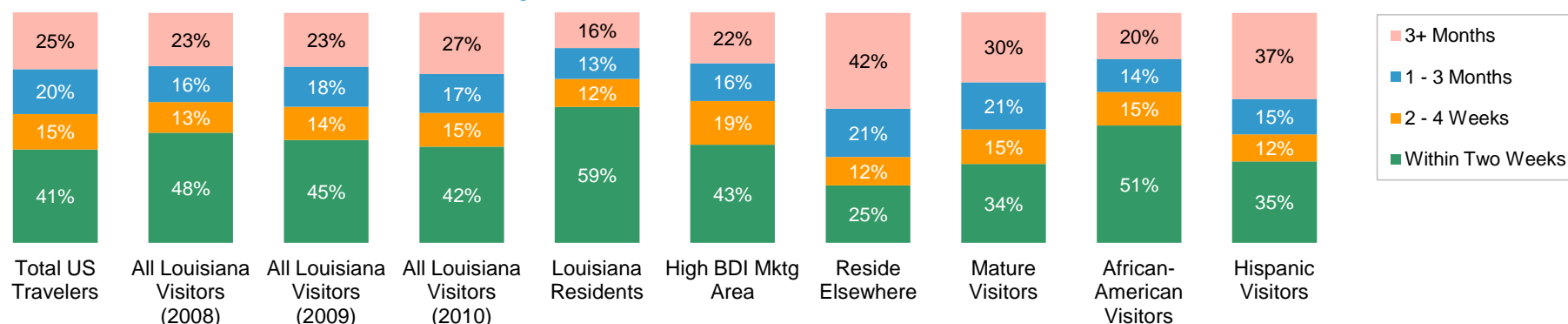


Trip planning – timing by segment

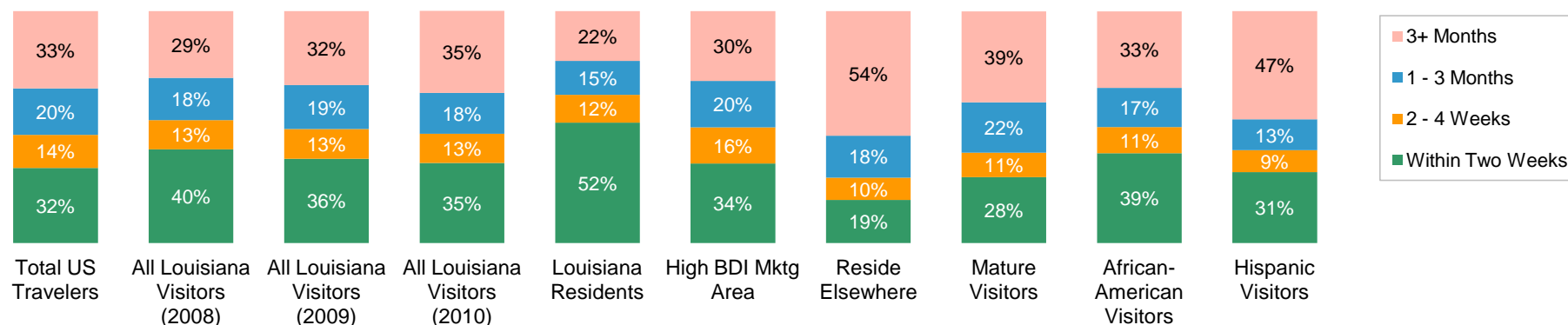
Logical patterns occur for trip planning

- With fewer spending the night, in-state visitors consider and decide to take relatively spontaneous trips
- Conversely, those traveling from farther distances (reside elsewhere) have longer planning horizons
- Mature visitors also tend toward slightly longer planning periods.

Time Decided On Trip Before Visit to Louisiana (except Total US Travelers = all trips)



Time Considered Trip Before Visit to Louisiana (except Total US Travelers = all trips)

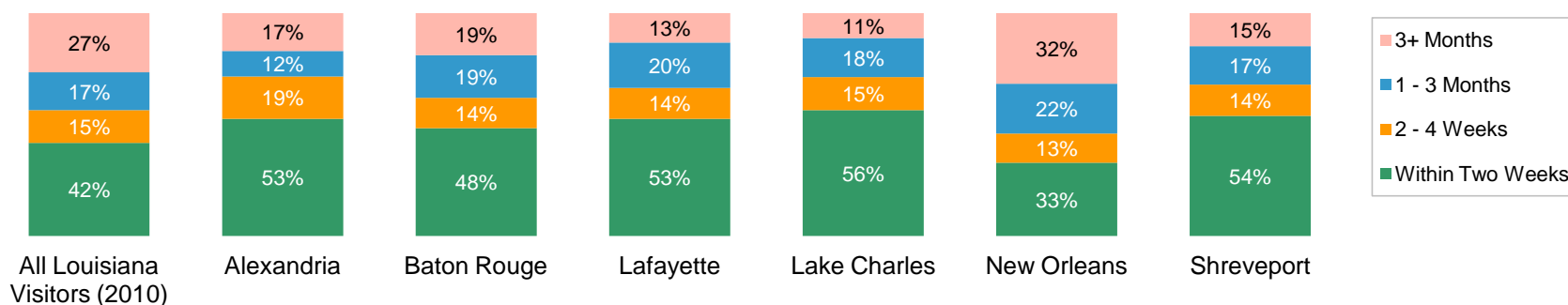


Trip planning – timing by destination

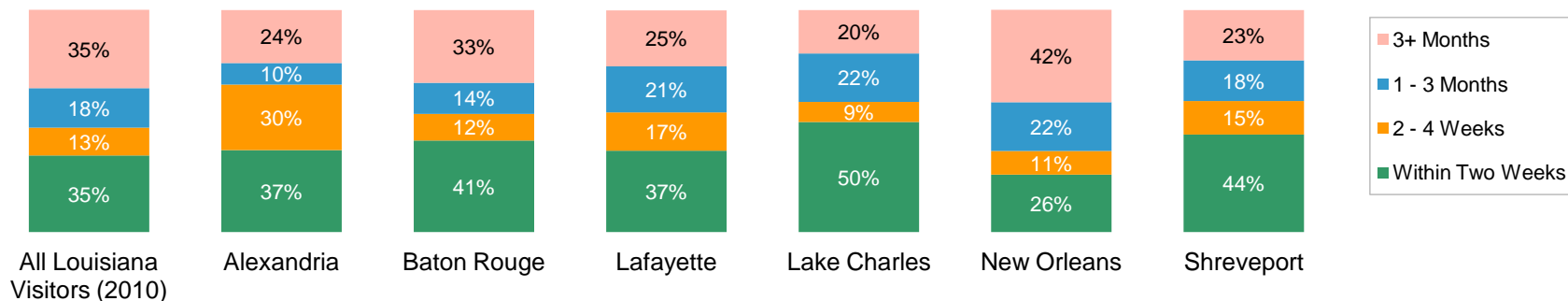
Trip planning relates to distance from primary source markets

- New Orleans visitors take longer to plan and decide on a trip, as is logical for the destination that has the highest proportion (43%) living outside the Louisiana and High BDI areas
- Of the remaining Louisiana destinations, only Baton Rouge has fewer than half who travel there relatively spontaneously (48% decide with two weeks).

Time Decided On Trip Before Visit to Louisiana



Time Considered Trip Before Visit to Louisiana



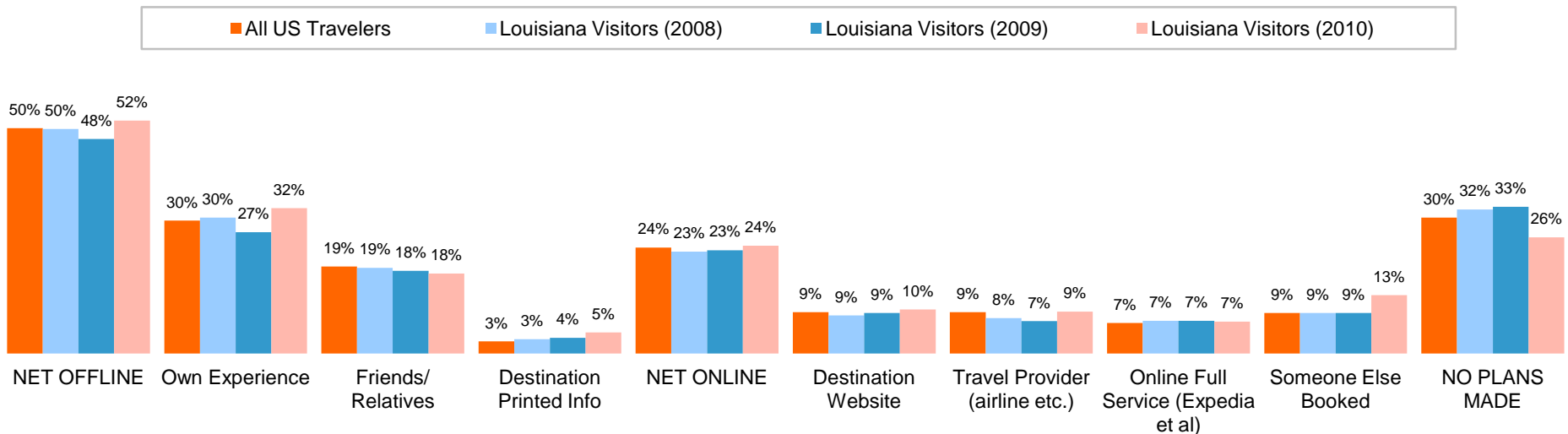
Trip planning – information sources

Louisiana visitors use similar sources as overall US travelers to gather information

Similar to total US travelers and similar to last year as well, Louisiana planners rely on their *past experience* and *word of mouth* as key sources of information, both of which are more difficult to influence than media advertising:

- Although the Internet is a popular place to gather information (24% for all travelers and for Louisiana visitors as well), just 1 in 10 currently uses destination websites
- Printed information (3% - 5%) has minimal reach and impact.

Information Sources to Plan a Trip
Ranked by Louisiana Visitors 2010 (5%+)



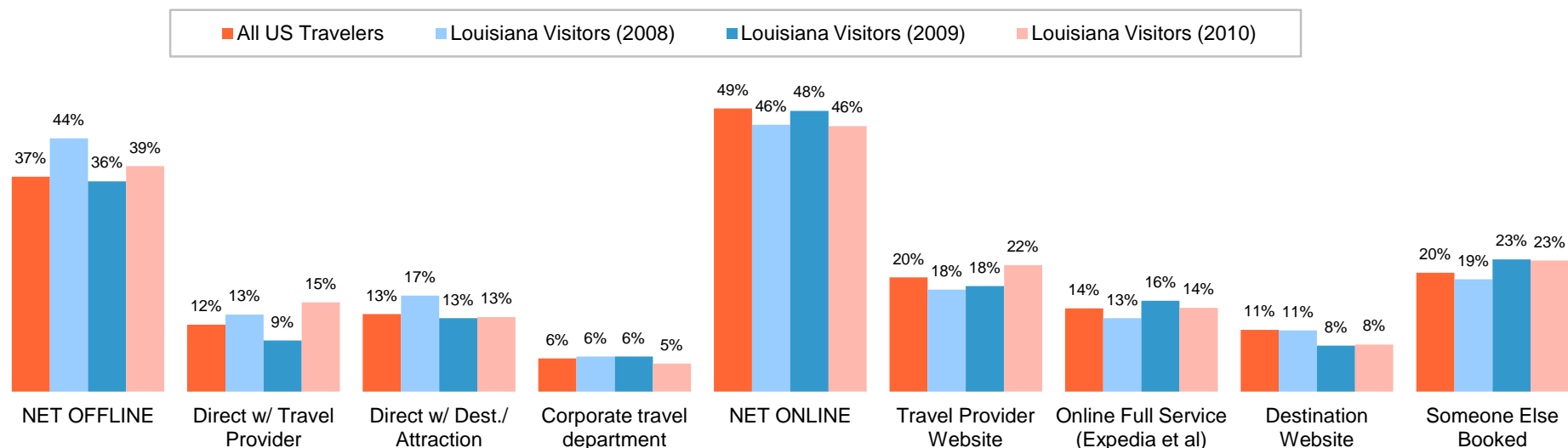
Trip booking methods

Online booking by Louisiana visitors slightly below overall US travelers

Gathering information from similar sources, Louisiana visitors book their trip components in ways similar to US travelers:

- Travelers do more *online* trip booking than *offline* in general (49% vs. 37%) and for Louisiana visitors as well (46% vs. 39%) – but the gap is smaller among Louisiana visitors, who show slightly more offline booking in 2010 than in 2009
- However, *travel provider website - online* (22%) leads as the top booking method among Louisiana visitors.

Method Used to Book Trip Components
Ranked by Louisiana Visitors 2010 (5%+)



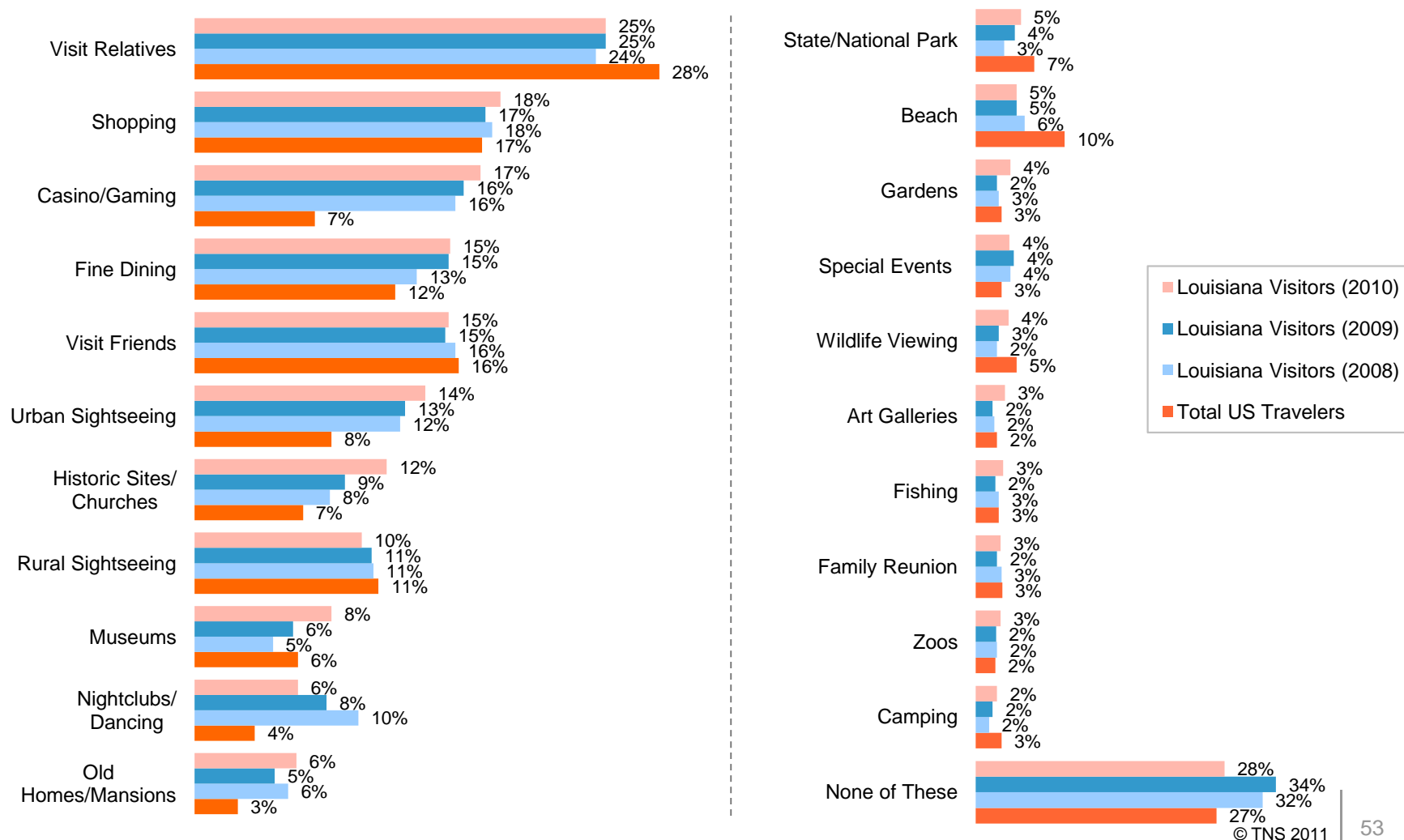
Trip characteristics: overall vacation activities

Louisiana visitors come to *visit, shop, gamble, and eat*

Compared to all US travelers, Louisiana visitors noticeably more often play *casino games*, *sightsee in cities*, *visit historic areas (Historic Sites, Churches, Old Homes/Mansions)*, and enjoy *fine dining* and *nightclubs*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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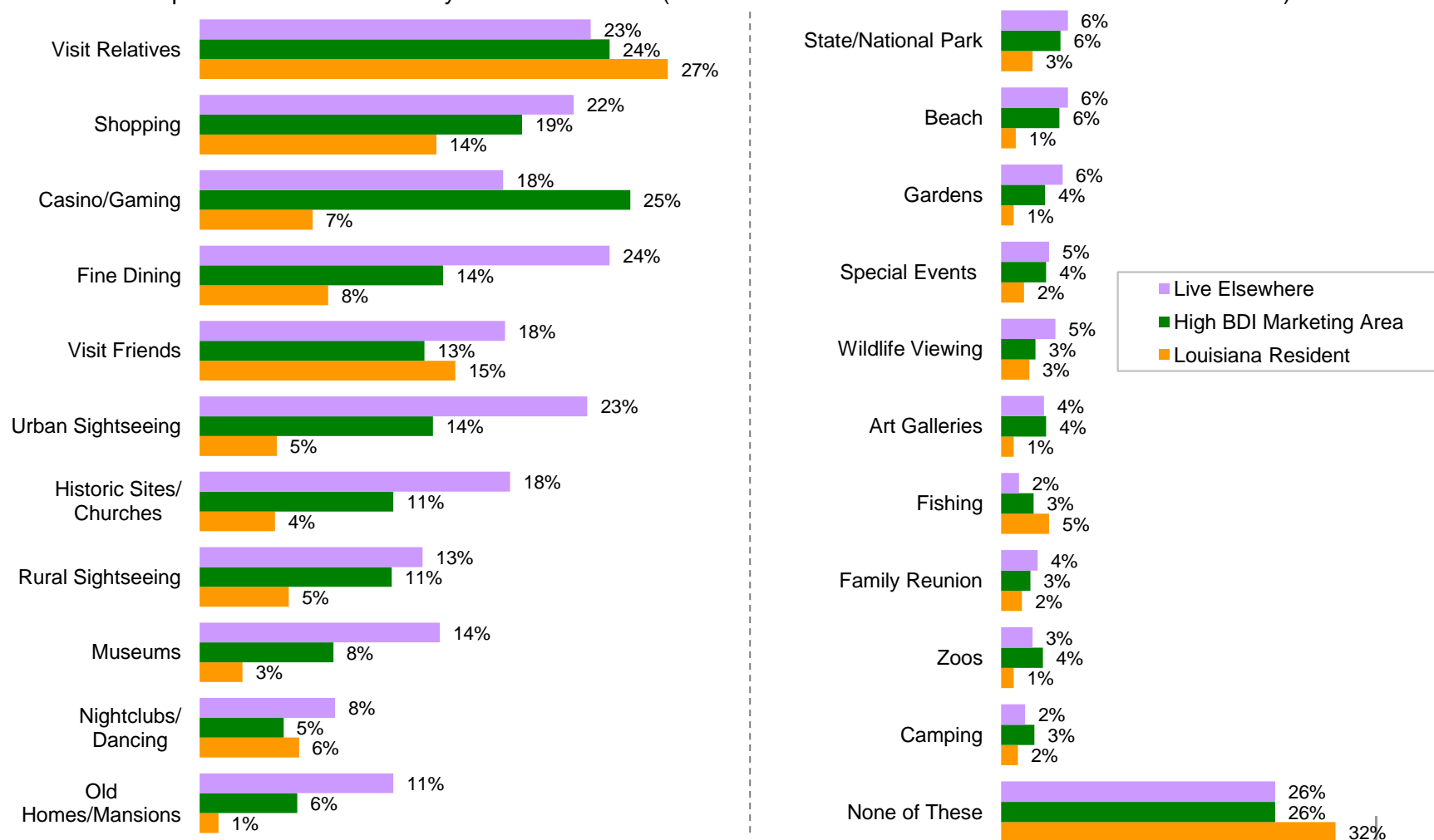
Trip characteristics: vacation activities by residence

In-state residents more often *visit relatives*

However, they lag non-residents on nearly every other activity. High BDI Marketing Area residents *gamble* more often than others while those living further away take greater advantage of nearly all other tourism features.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

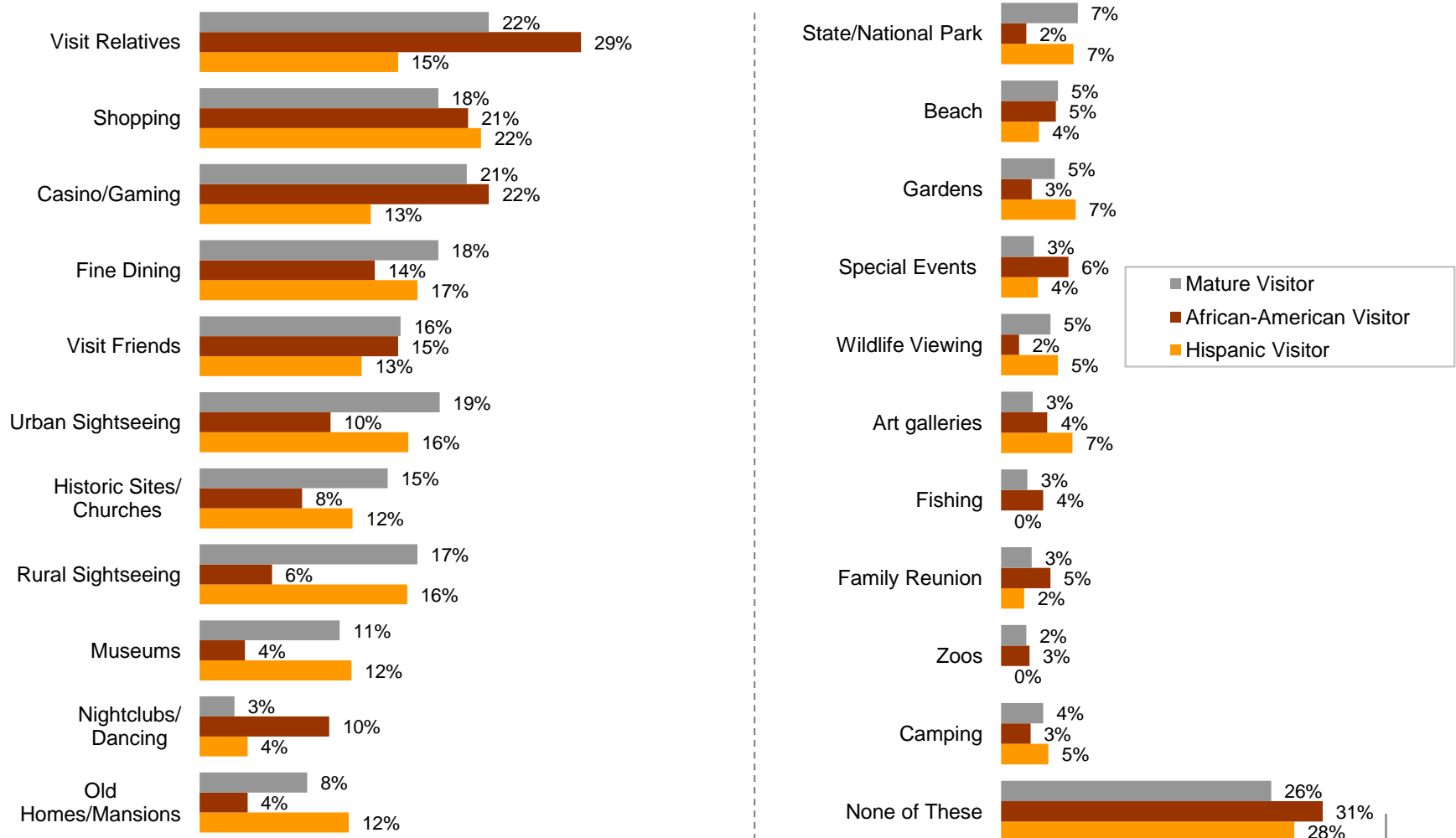
Trip characteristics: vacation activities by segment

Mature visitors *visit relatives and casinos, dine well, and they shop*

African-Americans, consistent with their travel purpose, often *visit friends and relatives* while in Louisiana. They also go to *nightclubs* much more often than others (10%). Hispanics *shop* (22%) more than any other activity.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with ,2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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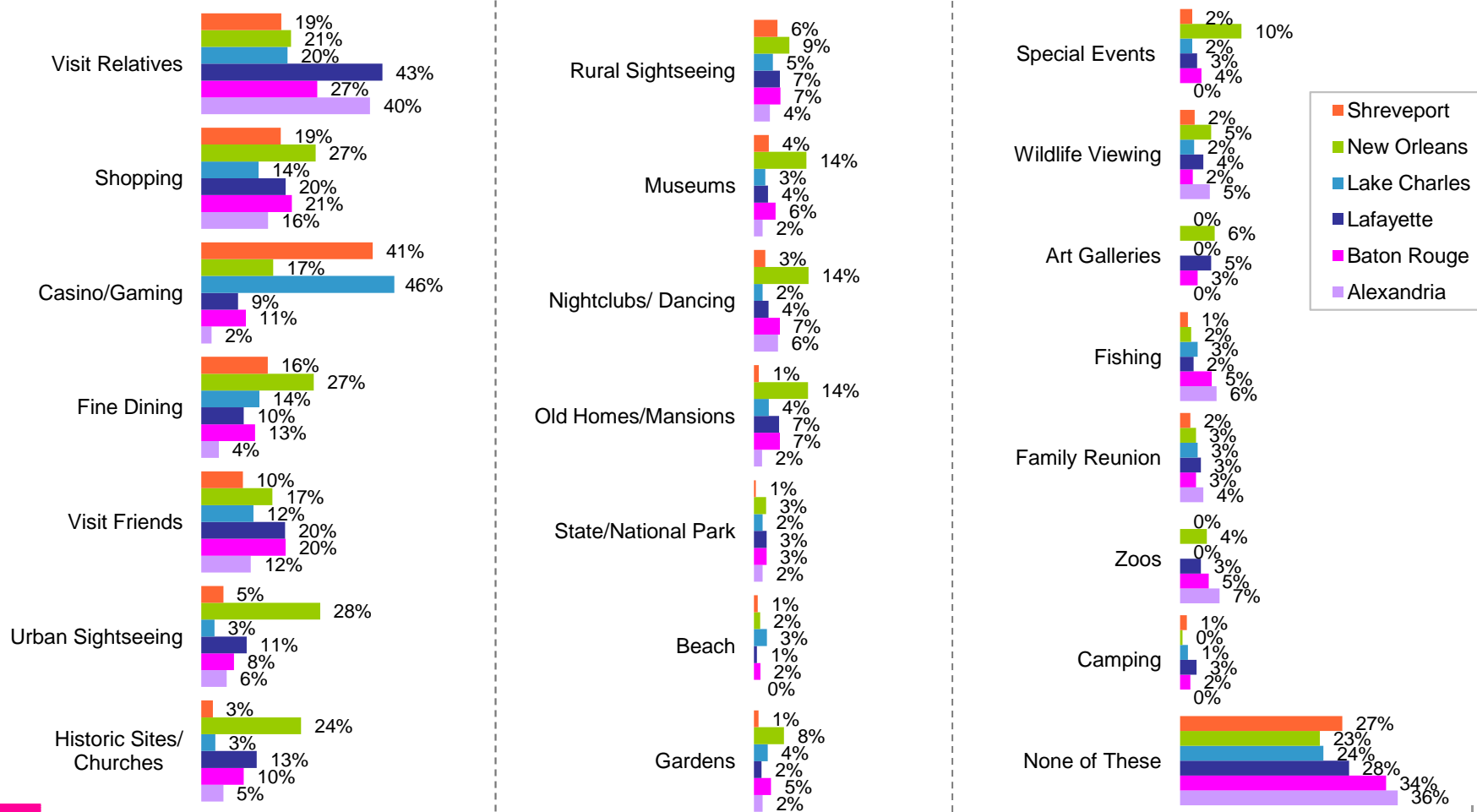
Trip characteristics: vacation activities by destination

Activities vary widely by destination

The most distinct destinations are New Orleans, which “owns” *history* and *museums*, *urban sightseeing*, *nightlife*, *dining*, and *special events*, and Lake Charles and Shreveport, which lure *casino/gaming* visitors.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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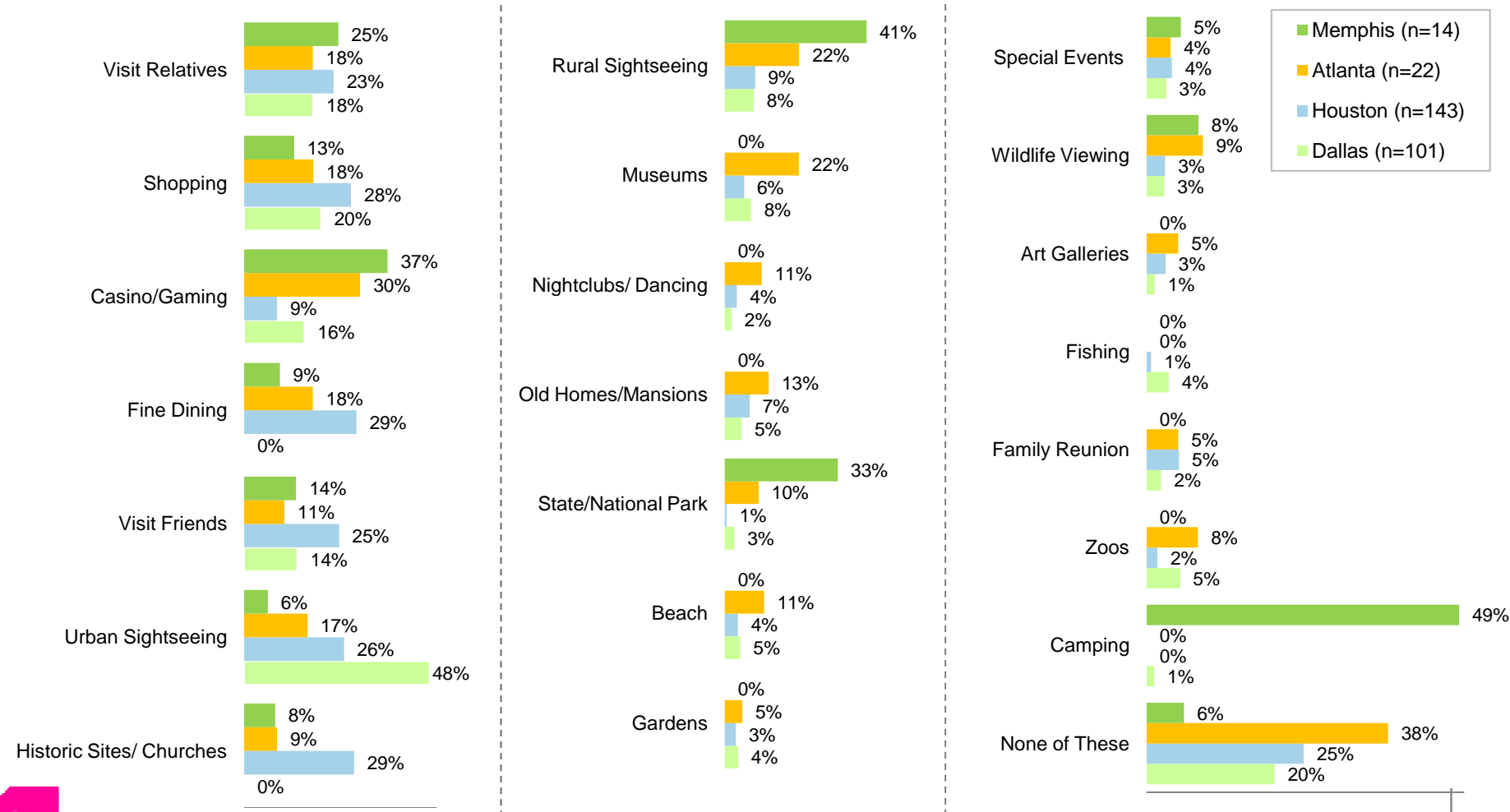
Trip characteristics: vacation activities by source

Activities vary by source of visitors

Visitors from **Dallas** most frequently opt for *urban sightseeing*; **Houston** visitors also *sightsee*, but add other urban activities (*shopping, fine dining*) and *visit historic sites* as well. Although **caution** is advised because of the very small sample, **Atlanta** visitors choose a variety of *urban activities plus gaming*; **Memphis** visitors also like the *casinos* and often select *outdoor activities*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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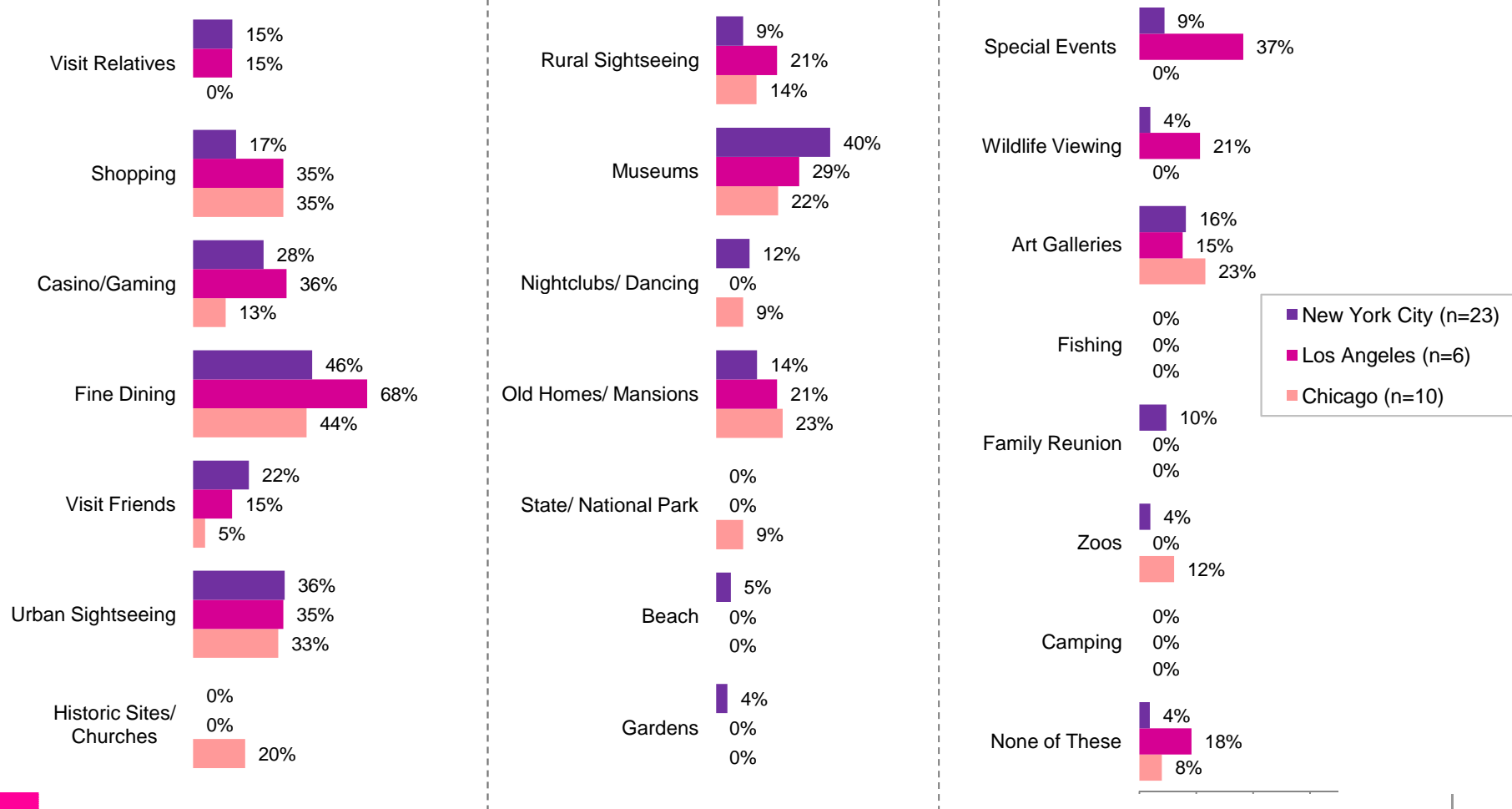
Trip characteristics: vacation activities by source

Activities vary by source of visitors

Again, with **caution** because of the very small sample, visitors from the three biggest US cities focus on similar activities on vacation, with *fine dining* and *urban sightseeing* topping the list. Those from **New York City** add *museums* to their activities and *Special Events* seem to attract those from **Los Angeles**. None seek the most outdoorsy options (*fishing, camping*).

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



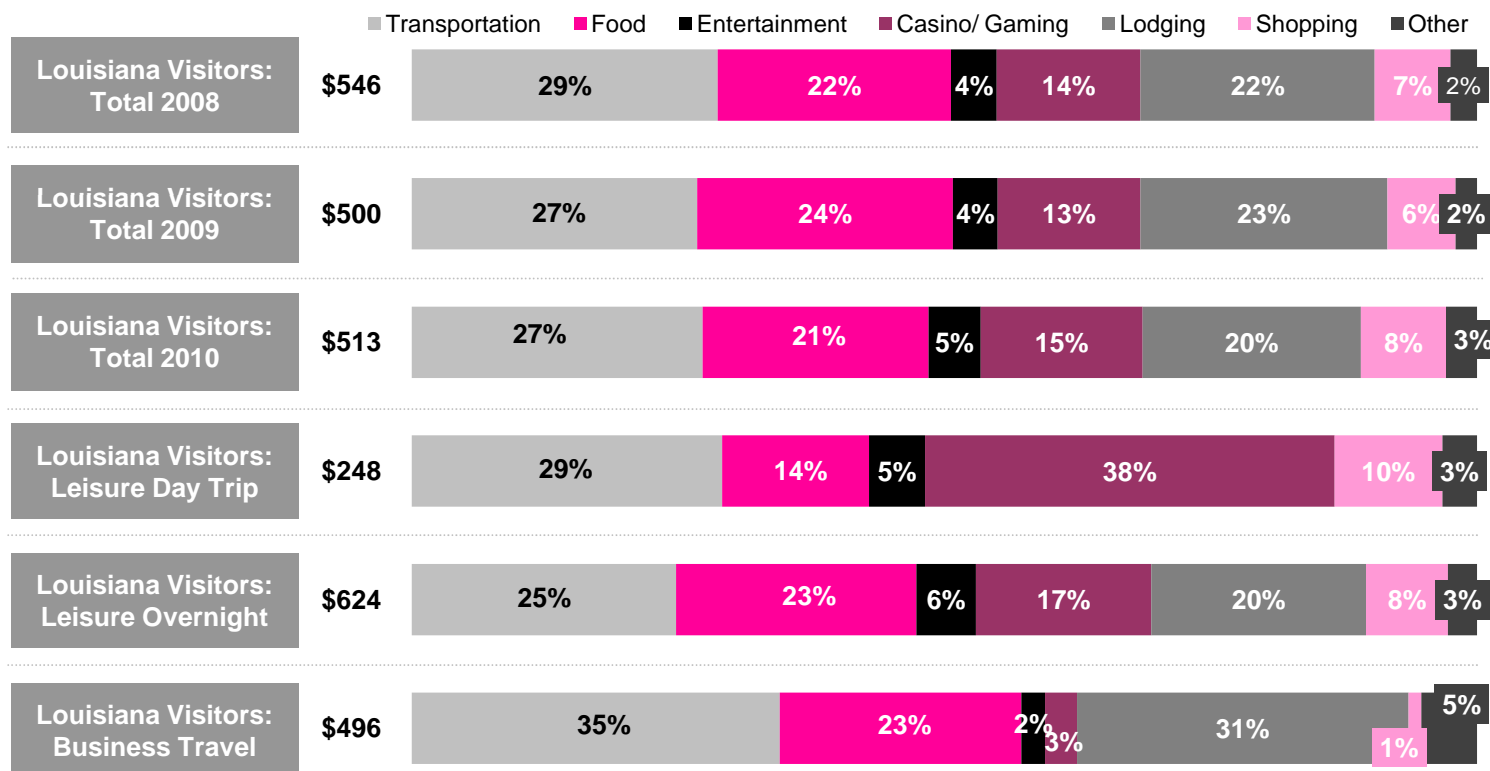
Trip expenditures by purpose

Visitor spending begins to recover from last year's dip

- Overnight visitors spend 2.5 times as much as day trip visitors (\$624 vs. \$248)
- Overnighters stay longer, of course, and allocate a large share of their travel budget for lodging
- Business travelers assign larger portions of their travel budget to lodging and transportation (consistent with their greater likelihood of flying).

Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Note 2: Not all respondents classified as business or leisure (personal business and other)

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)



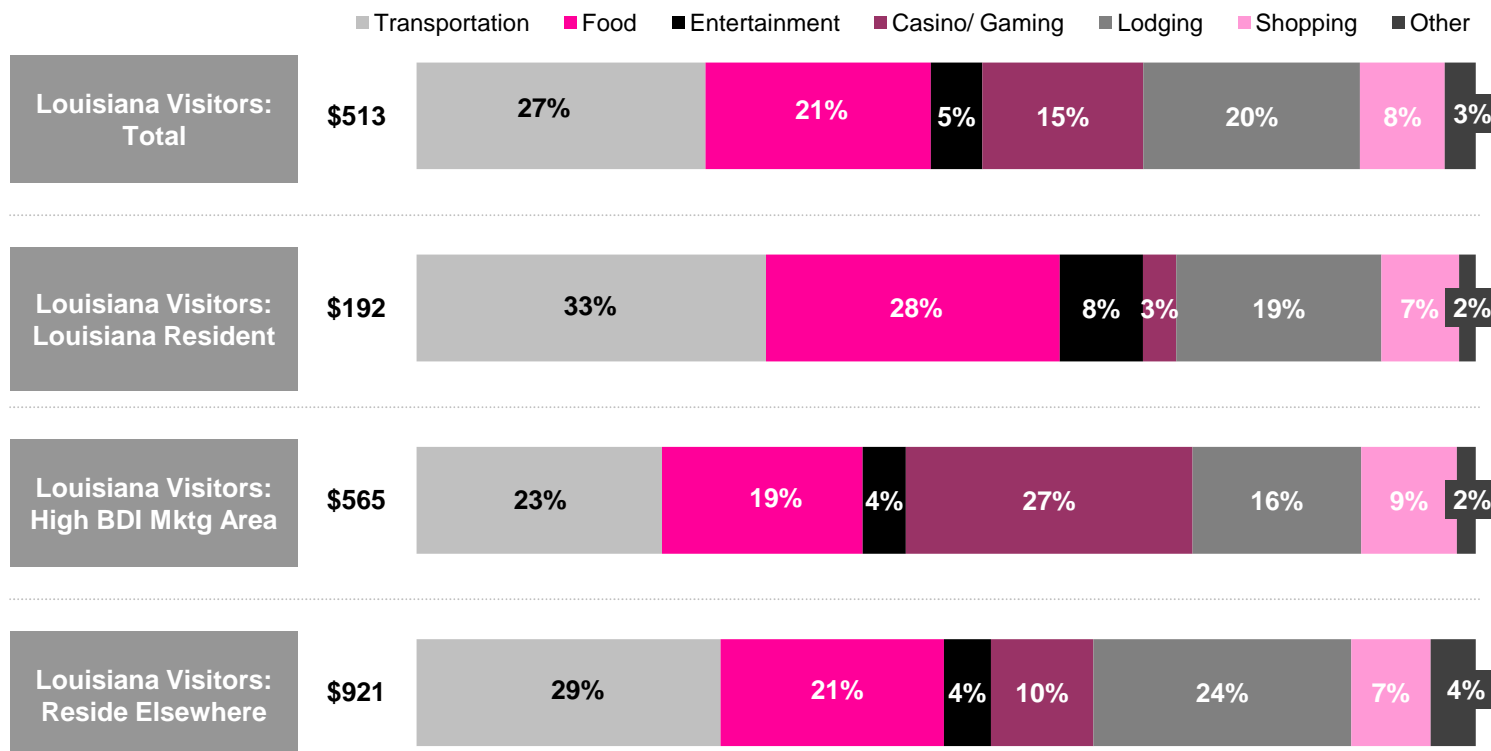
Trip expenditures by residence

Value of visitors climbs with distance traveled

- With greater distance, those outside the state and outside the High BDI Marketing area spend more of their travel budgets for lodging (24%) and transportation (29%, presumably many fly)
- High BDI Marketing Area residents spend the largest share (27%) on gaming, averaging \$478 (when non-gamblers are excluded)
- Transportation and food “consume” the largest bites out of in-state visitors’ budgets.

Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

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Trip expenditures by segment

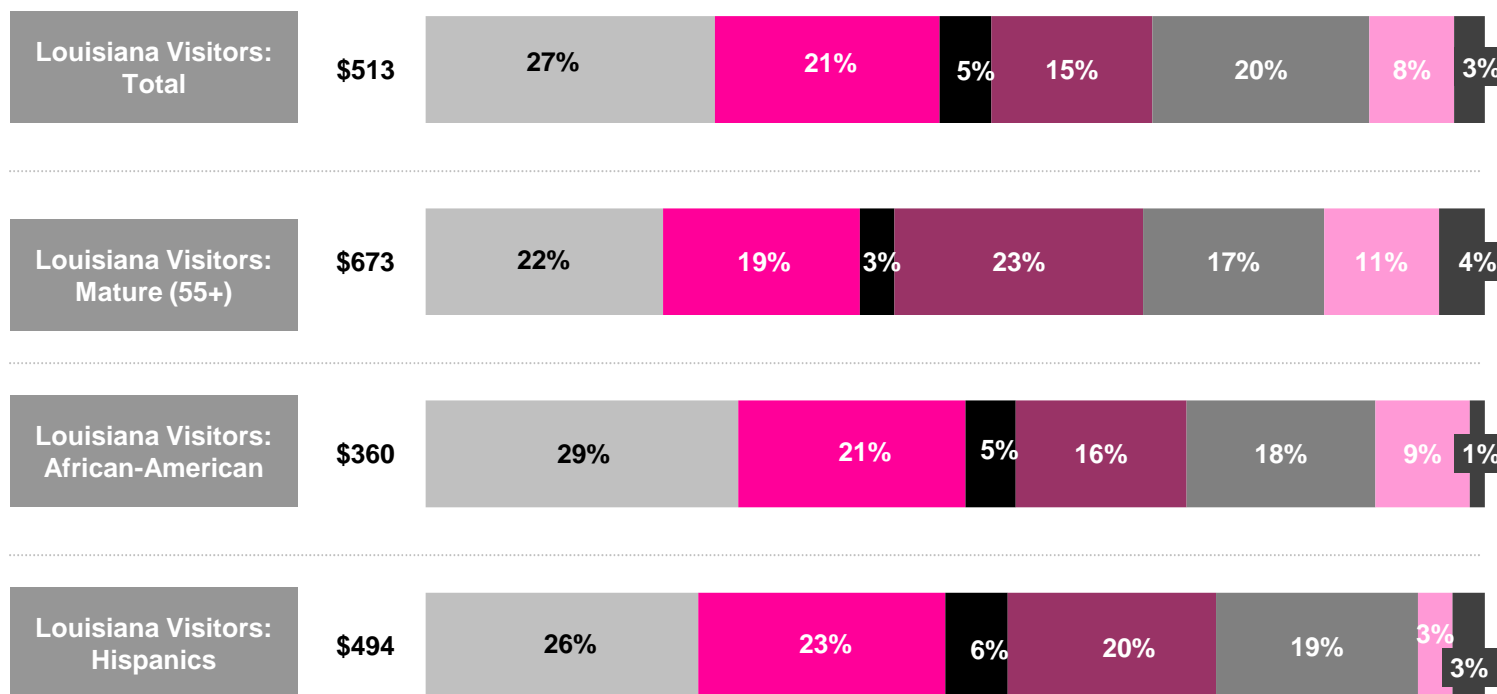
Visitor spending choices vary widely

- Mature visitors spend the largest share of their travel budgets on transportation and gaming
- African-Americans tend to spend less and Hispanics more – a pattern noted in prior reports (2007-2009)
- African-Americans spend average amounts on entertainment, despite a fondness for nightclubs/dancing, and average amounts for lodging, despite a higher proportion of day trips and stays with friends/relatives.

Average Spending in Louisiana by Segment

Total Spending by Travel Party (Total Spending, including 0)

■ Transportation ■ Food ■ Entertainment ■ Casino/ Gaming ■ Lodging ■ Shopping ■ Other



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

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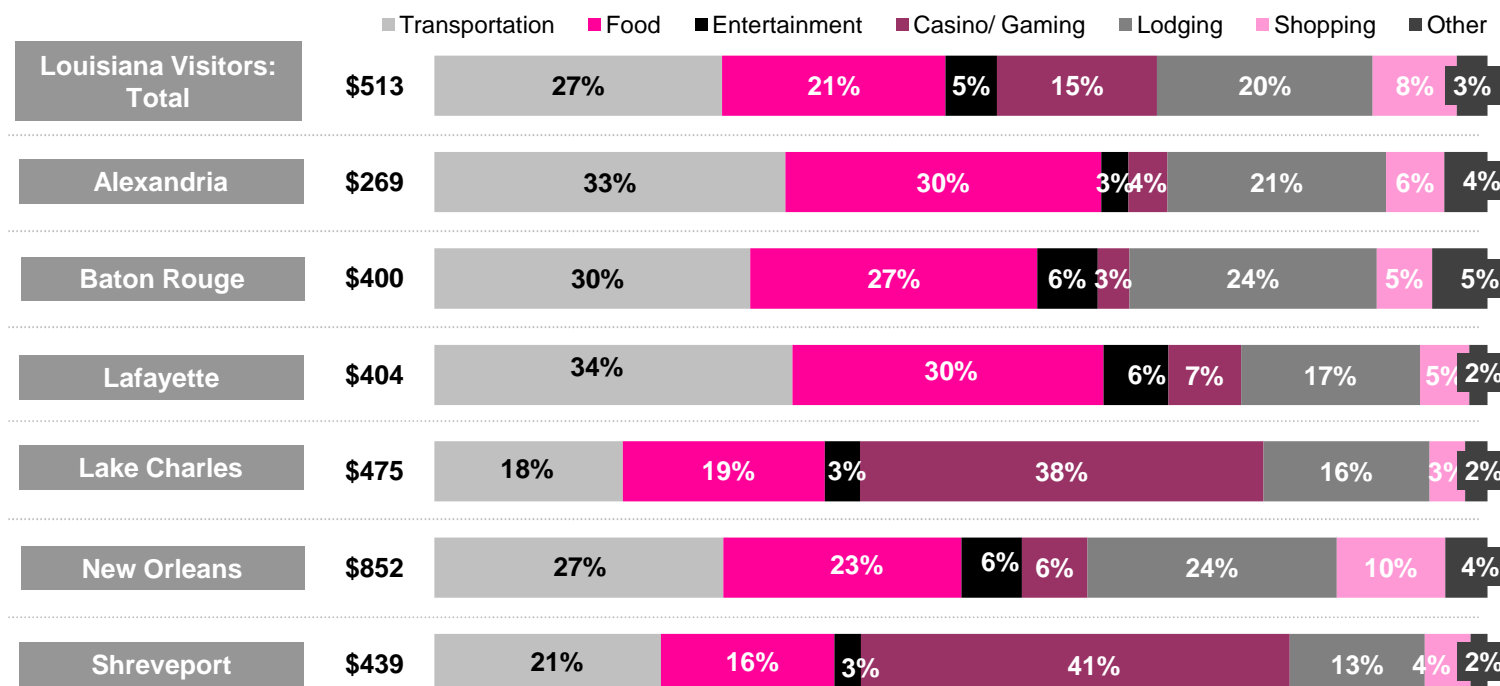
Trip expenditures by destination

New Orleans visitors spend more than others

- New Orleans visitors, who come from farther away and stay longer, also spend more
- Very similar to last year, spending by visitors going to other areas hovers between \$400 and \$500 – somewhat less for those visiting Alexandria.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

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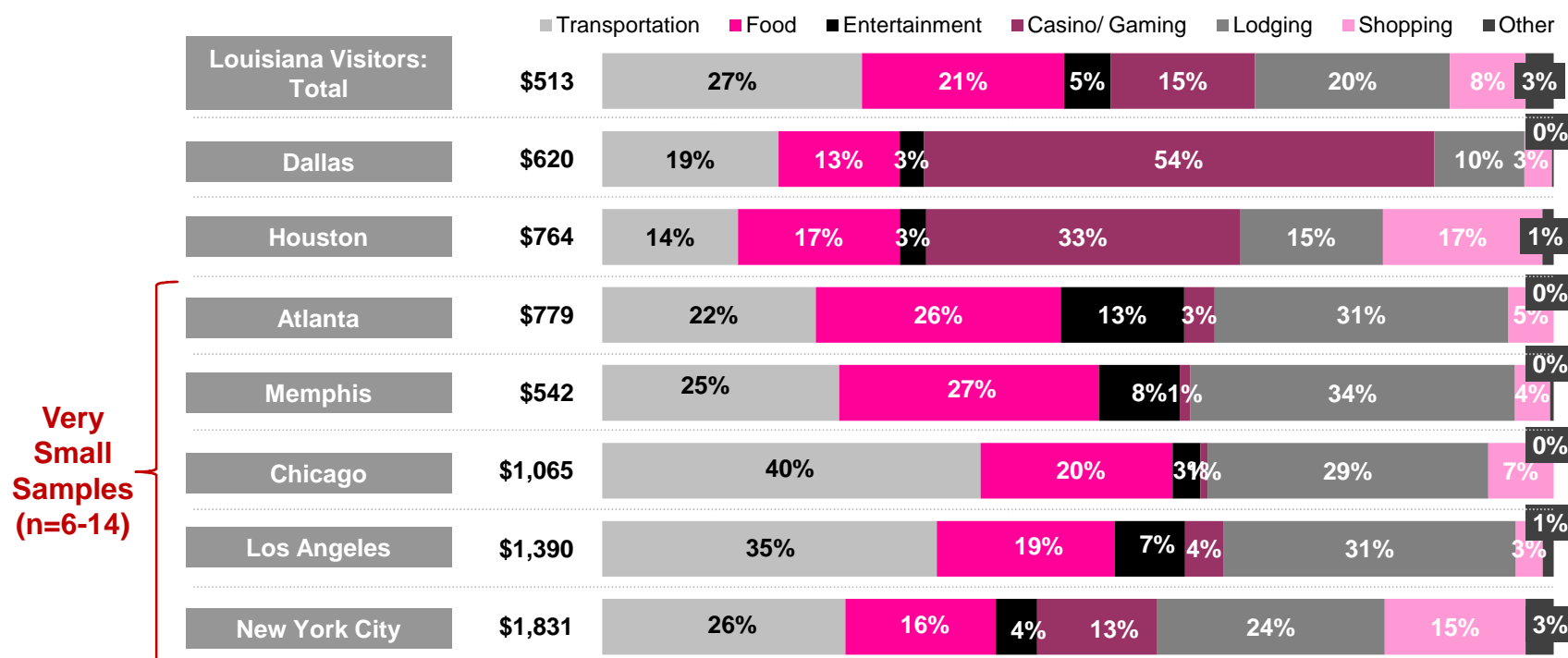
Trip expenditures by source

Visitors from the three biggest cities spend more than others

- Those from Texas (Dallas and Houston) spend far more on gaming than other visitors
- Atlanta and Memphis visitors seem to more heavily focus on Louisiana's food and entertainment.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

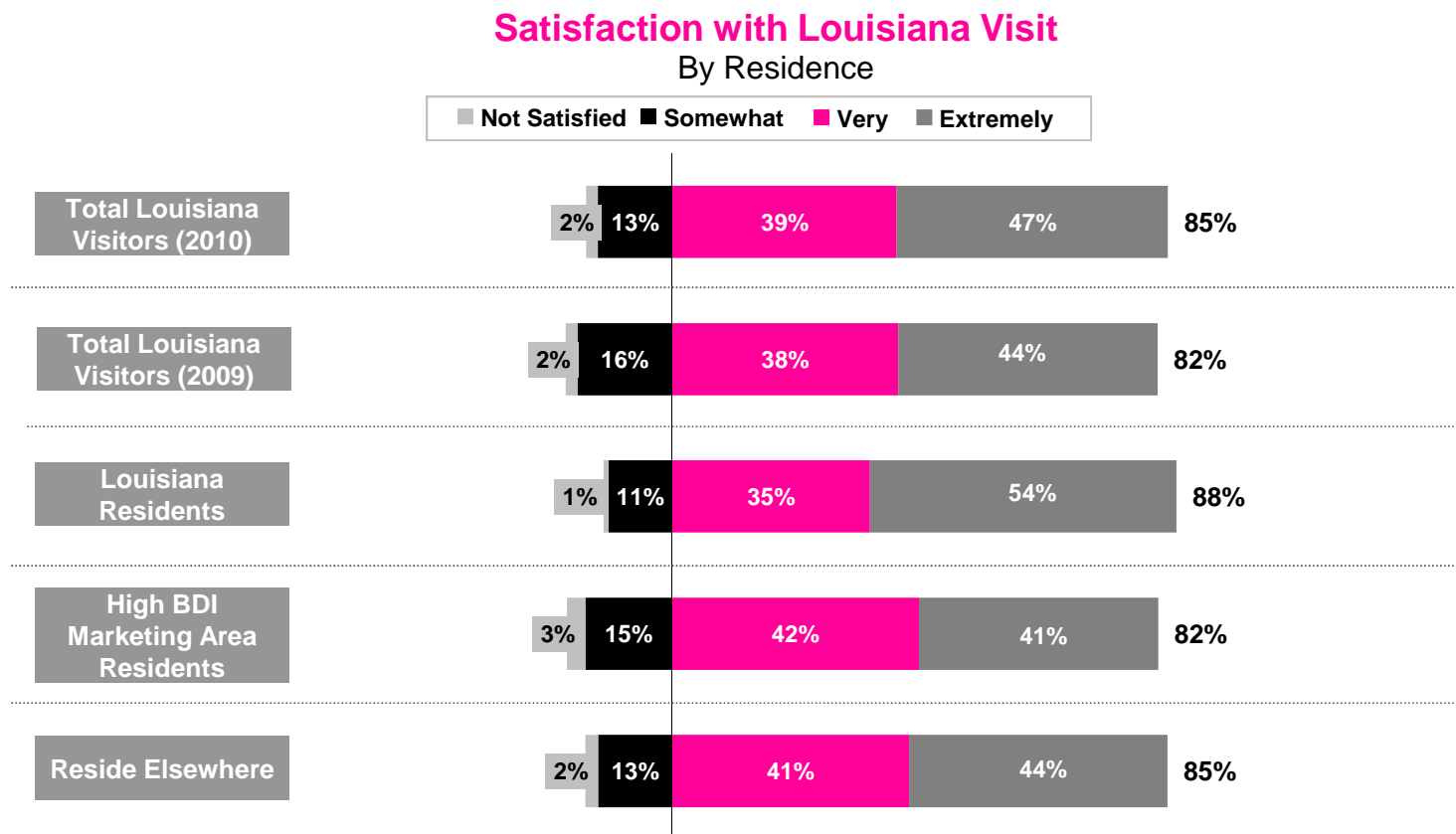
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Satisfaction with Louisiana by residence

Satisfaction is strong regardless of residence

- Top box (extremely satisfied) endorsements often correlate with proximity, and not surprisingly Louisiana residents provide the most favorable ratings of their home state
- More than 8 in 10 visitors from both the High BDI marketing area and “elsewhere” also praise their trip
- Only 1% to 3% complain about Louisiana as a destination.



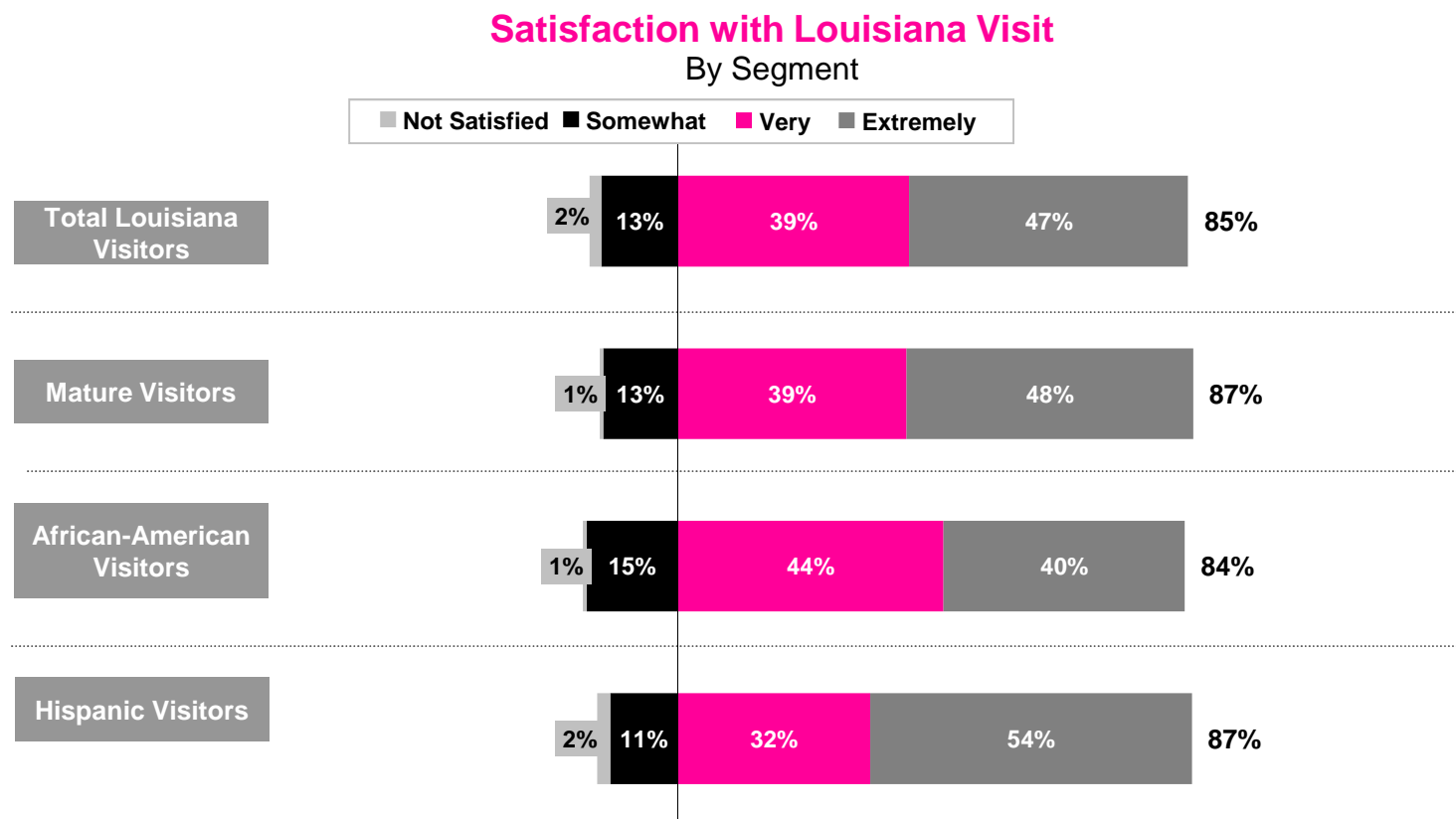
*Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

Satisfaction with Louisiana by segment

Satisfaction is also quite strong across key segments

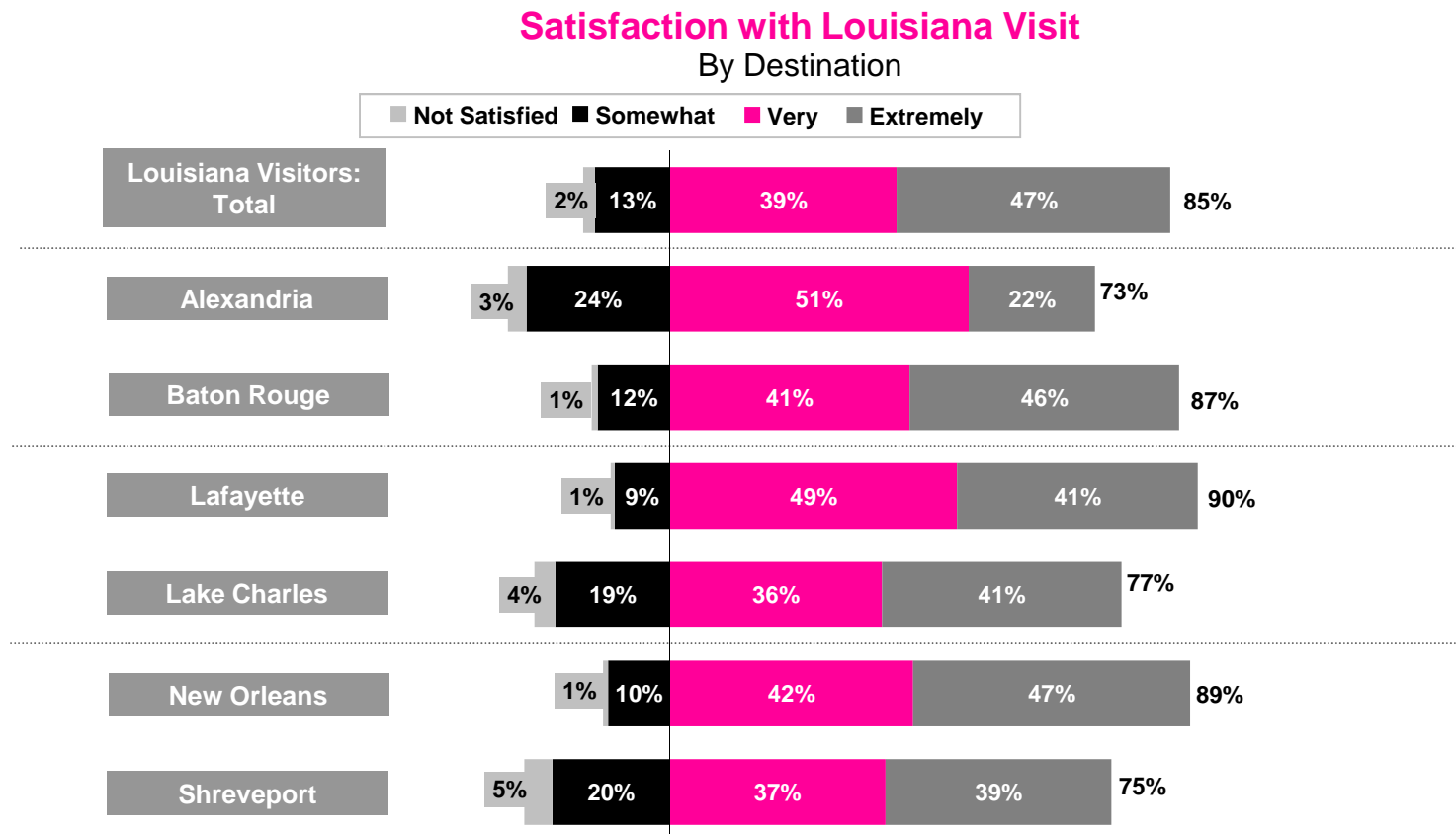
- Satisfaction among Mature and Hispanic (87%) visitors slightly exceeds Total Louisiana visitors, countered by just slightly less enthusiastic African-American visitors (84%)
- Very few (1% - 2%) visitors indicate displeasure.



Satisfaction with Louisiana by destination

Satisfaction varies somewhat by destination

- Lafayette, New Orleans, and Baton Rouge visitors seem to go home slightly happier than visitors elsewhere in Louisiana
- Although only a few (4% - 5%) people, Lake Charles and Shreveport host the largest share of unsatisfied visitors (perhaps gaming losses?)
- Alexandria receives generally more modest praise.



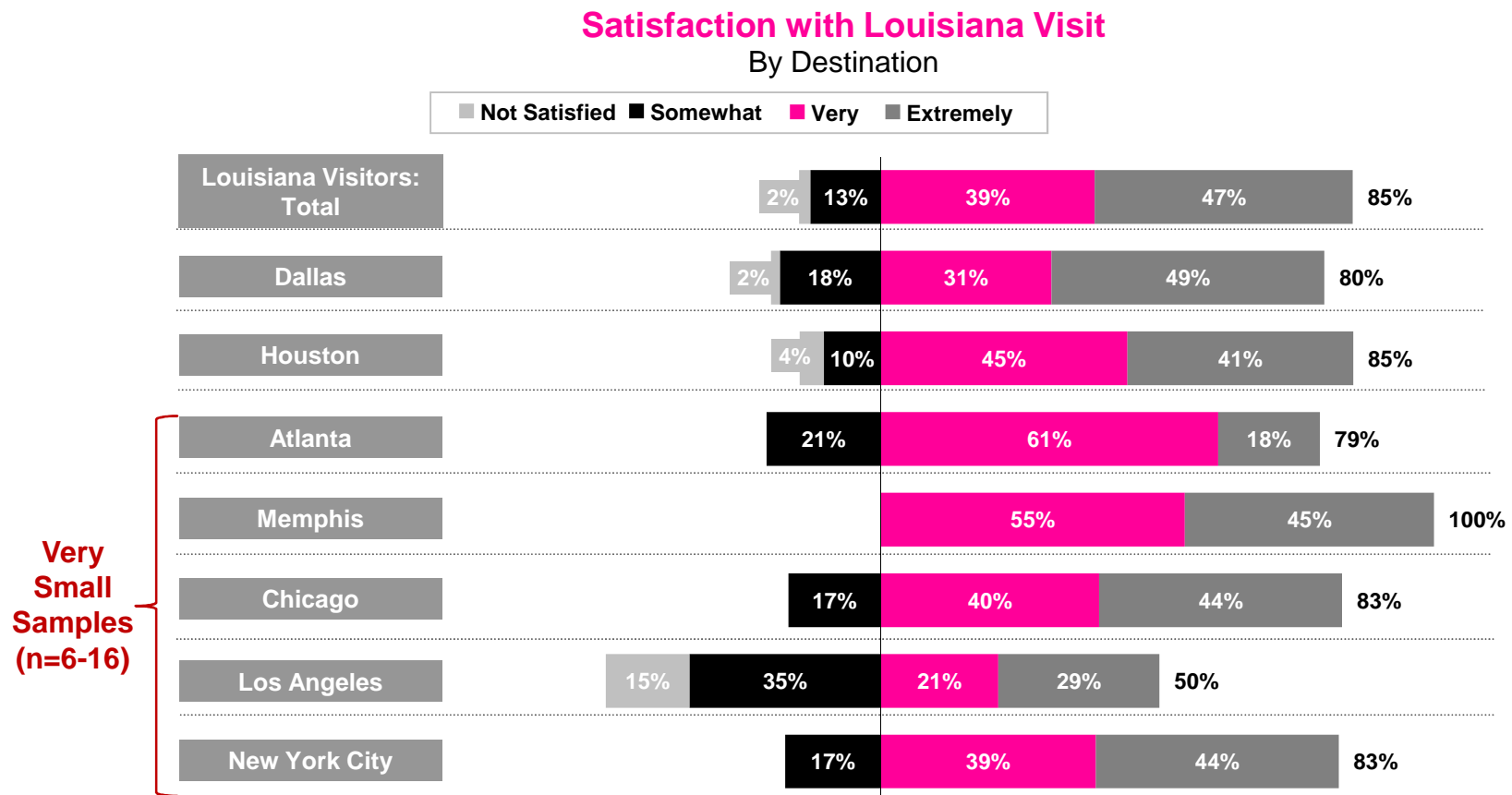
Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

Satisfaction with Louisiana by source

Satisfaction varies somewhat by source

- Generally, about four out of five visitors highly praise Louisiana
- Memphis visitors (n=6) universally hail the state while several of those from Los Angeles (also an n=6) appear disappointed.



Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

Competitive States



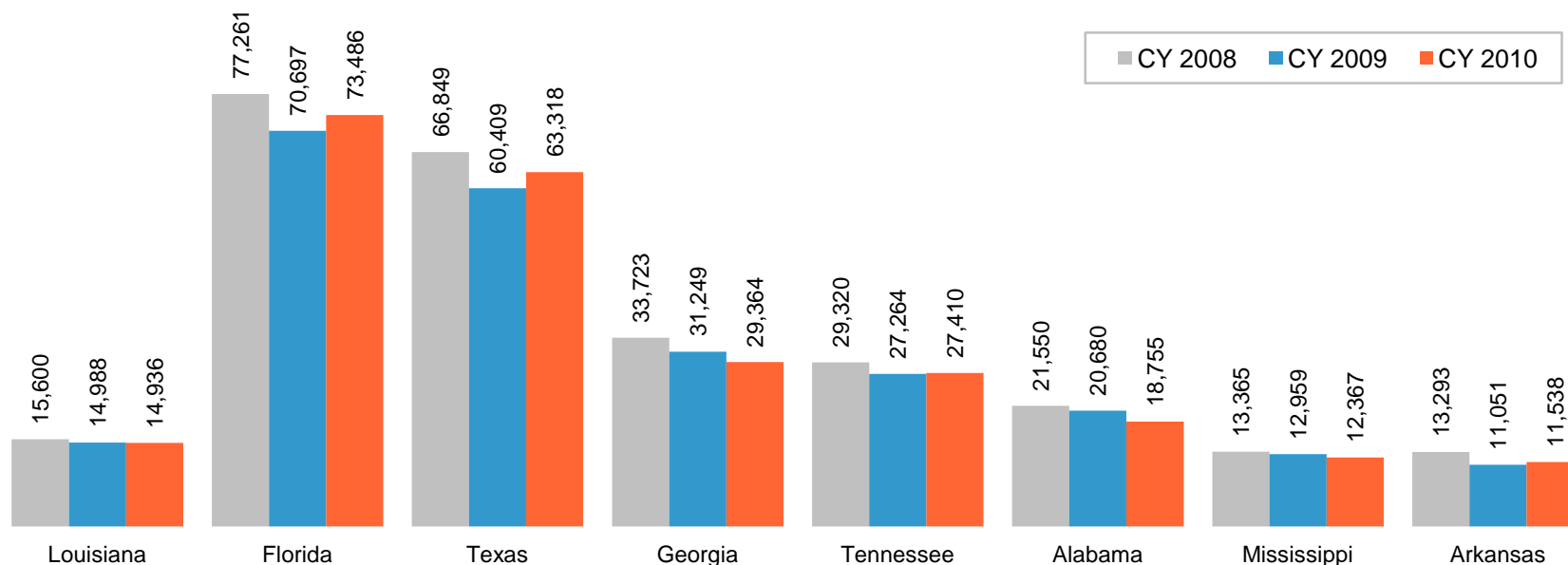
Competitive states' visitor volumes

Among eight key competitors, Louisiana ranks sixth

- Florida and Texas draw the largest share of visitors, although Texas is the least dependent on out-of-state visitation of all states
- Louisiana draws a relatively high proportion of visitors from out-of-state – most similar to Georgia.

Visitors (Person-Trips) to Louisiana and Competitive States

(Volume in 000)



% (Households) from Out-of-State

CY 2009	65%	59%	33%	64%	71%	67%	63%	74%
CY 2008	64%	59%	31%	65%	73%	67%	58%	71%
CY 2010	64%	56%	31%	65%	72%	61%	62%	71%



Q4a. Please indicate the US state(s) visited (Person Trips-projected) (day or overnight trip)

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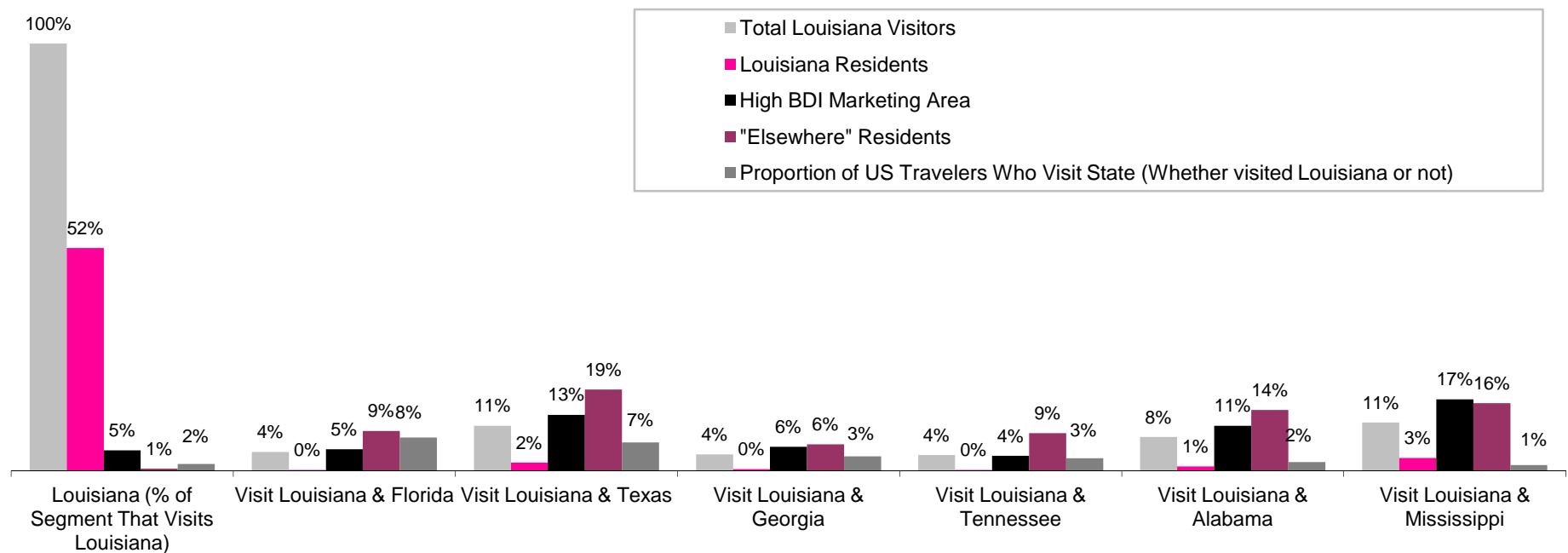
Key competitors to Louisiana (among Louisiana visitors)

Louisiana primarily shares visitors with TX, AL, and MS

- Among the total US market of all travelers, Florida (8%) and Texas (7%) draw the largest share of visitors among these key states. Tennessee, Georgia, Louisiana, Alabama, and Mississippi attract far fewer US visitors (1%-3%).
- Texas, Alabama, and Mississippi most often entice Louisiana visitors to also stop in their state, whether they live in Louisiana, the High BDI Marketing Area, or Elsewhere; or conversely, Louisiana most successfully lures visitors to those states to add time in Louisiana as well.

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+)

(Past month, whether on same trip or not)

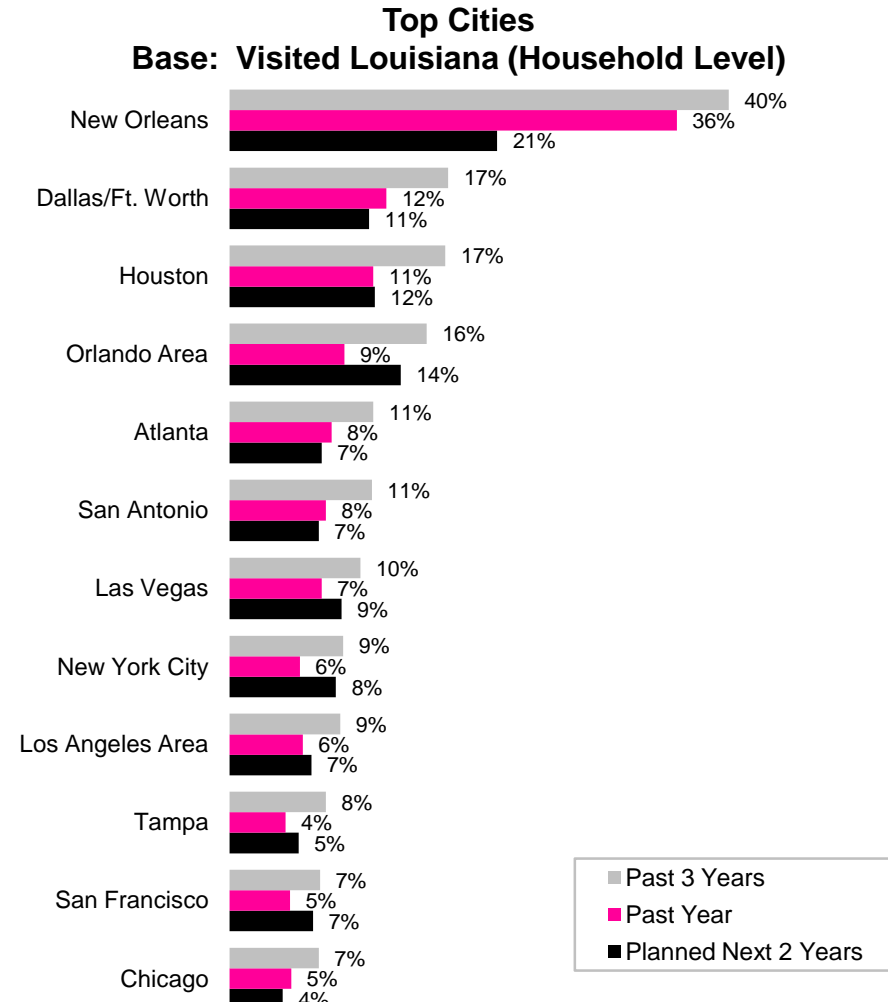
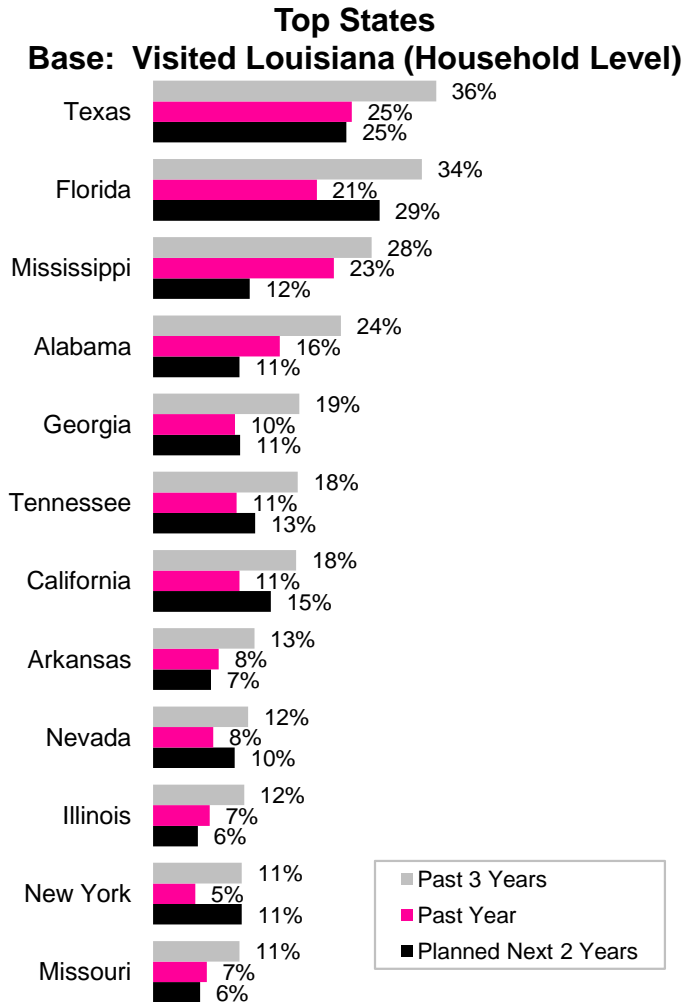


Competitive state and city destinations

Southern states and large cities compete with Louisiana

Other Areas Visited by Louisiana Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years



Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)

Another key competitor view (visited Louisiana or not)

Geography impacts destination choices

As noted in other TNS reports, geography plays a key role in destination selection – the states most likely visited/planned to visit vary by travelers' residence:

- **Louisiana residents** visit close to home, with Louisiana topping the list of eight competitive destinations for past visits (both the 3-year and 1-year time periods). They select *Texas* as the leading competitor. For future travel, *Florida* and *Texas* generate the greatest interest
- If travelers **live in the High BDI Marketing Area**, *Texas* tops the list for past visits (3 years or 1 year) while *Florida* takes the lead for future plans. *Louisiana* ranks third in all three categories, behind Florida and Texas
- Those living **elsewhere (neither the High BDI Marketing Area nor Louisiana)** seldom (4% in past 3 years) choose to visit *Louisiana*, usually opting for *Florida*.

Visitation (Households) by Residence Over Time

Competitive Set: AL, AR, FL, GA, LA, MS, TN, TX	Visited Past 3 Years	Visited Past Year	Plan to Visit Next 2 Years
RESIDE IN LOUISIANA			
Visit Louisiana	48%	42%	22%
Strongest Competitor (of the set)	42 (TX)	29 (TX)	34 (FL)
Second-Strongest Competitor	36 (FL)	26 (MS)	31 (TX)
Third-Strongest Competitor	35 (MS)	22 (FL)	19 (MS)
RESIDE IN HIGH BDI MKTG AREA			
Visit Louisiana	17%	11%	12%
Strongest Competitor	36 (TX)	30 (TX)	26 (FL)
Second-Strongest Competitor	30 (FL)	20 (FL)	21 (TX)
Third-Strongest Competitor	15 (TN)	9 (AR/TN Tie)	10 (TN)
RESIDE ELSEWHERE			
Visit Louisiana	4%	2%	3%
Strongest Competitor	27 (FL)	17 (FL)	27 (FL)
Second-Strongest Competitor	11 (GA)	7 (GA)	8 (TX)
Third-Strongest Competitor	10 (TN/TX Tie)	6 (TN/TX Tie)	7(GE/TN Tie)

Q7a: Please indicate US states visited for leisure in past three years. Q7b. Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Competitive spending: Louisiana vs. nearby states

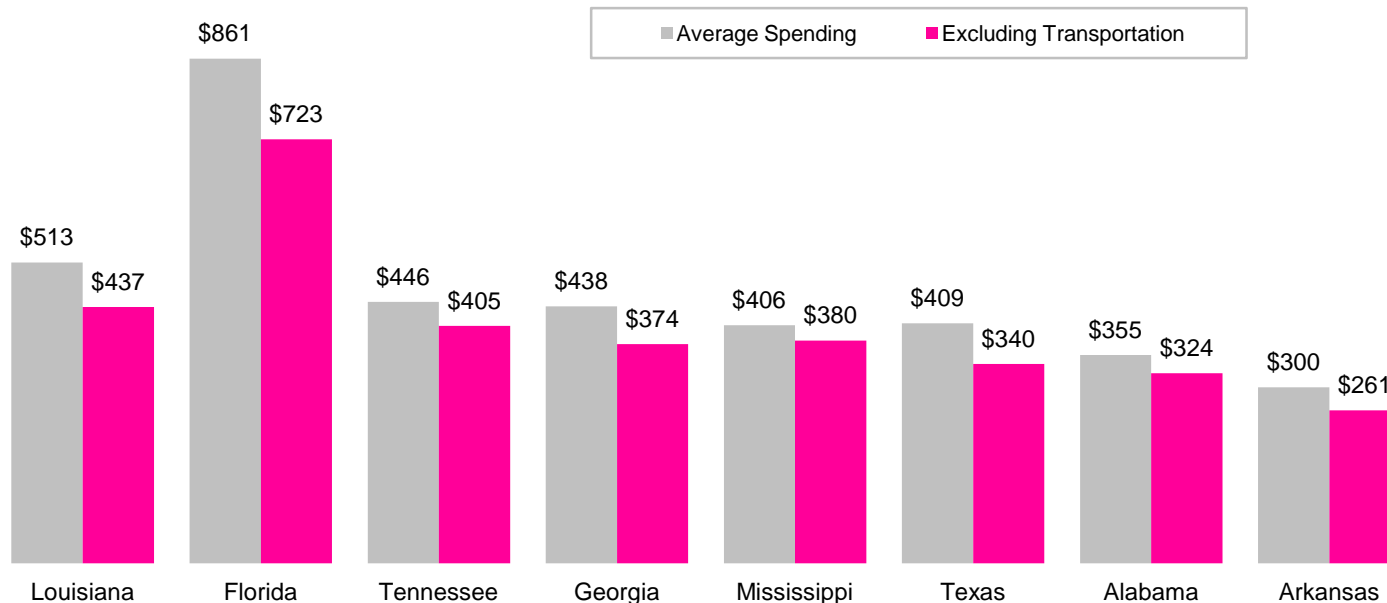
Trip spending usually hovers between \$400-\$500

Still, spending varies by destination:

- Florida continues to be the one exception, where (\$861) trip spending nearly doubles nearby states, but transportation accounts for a larger proportion than for other states
- Louisiana (\$513) and Tennessee (\$446) vie for second (distantly).

Average Annual Spending (Q4g): Louisiana vs. Nearby States

Total Spending (Business/Leisure/Day/Overnight) by Travel Party (Total Spending, including 0)

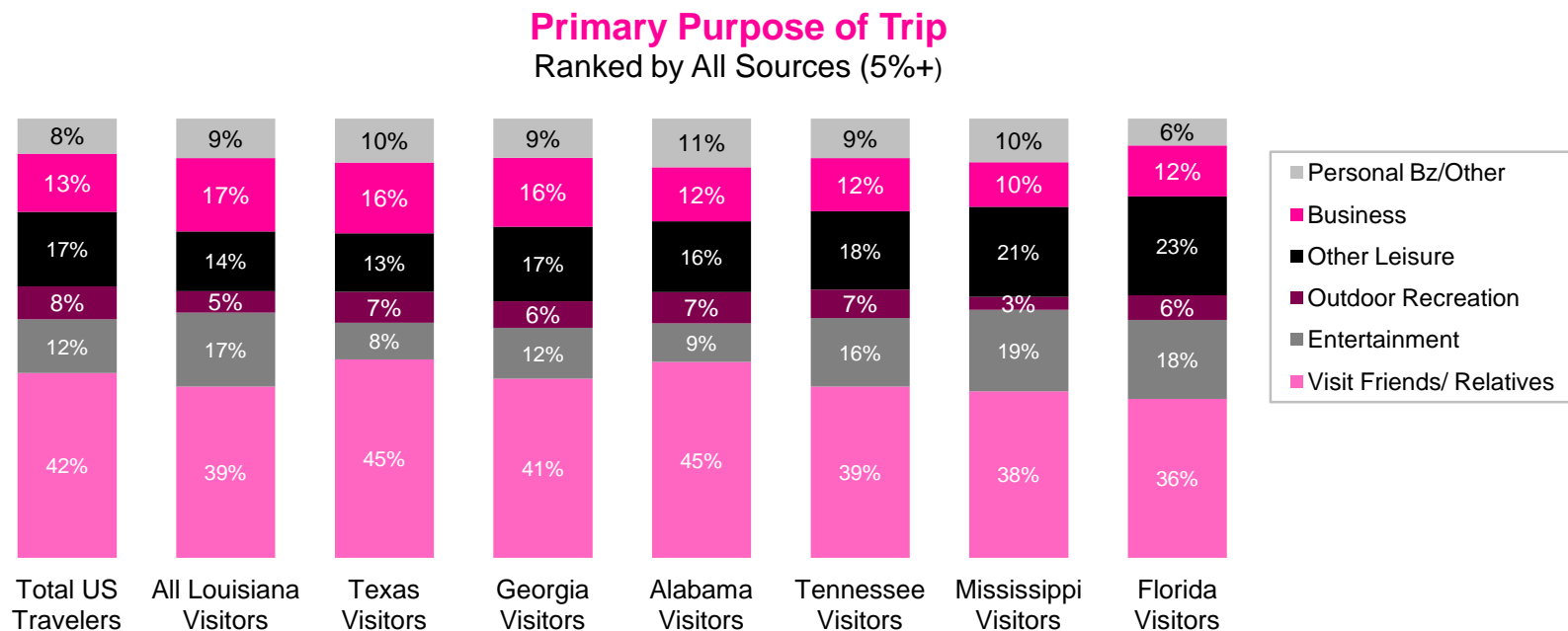


Competitive states - trip purpose

Reasons for travel vary minimally by state; leisure dominates

Further, visits to friends and relatives motivate most trips. Other observations include:

- Texas and Georgia (16%) lead on business travel; Louisiana (13%) ranks next
- Entertainment attracts a larger proportion of visitors to Mississippi (gaming) and Florida (Orlando) than other states; Louisiana (17%) places above average.

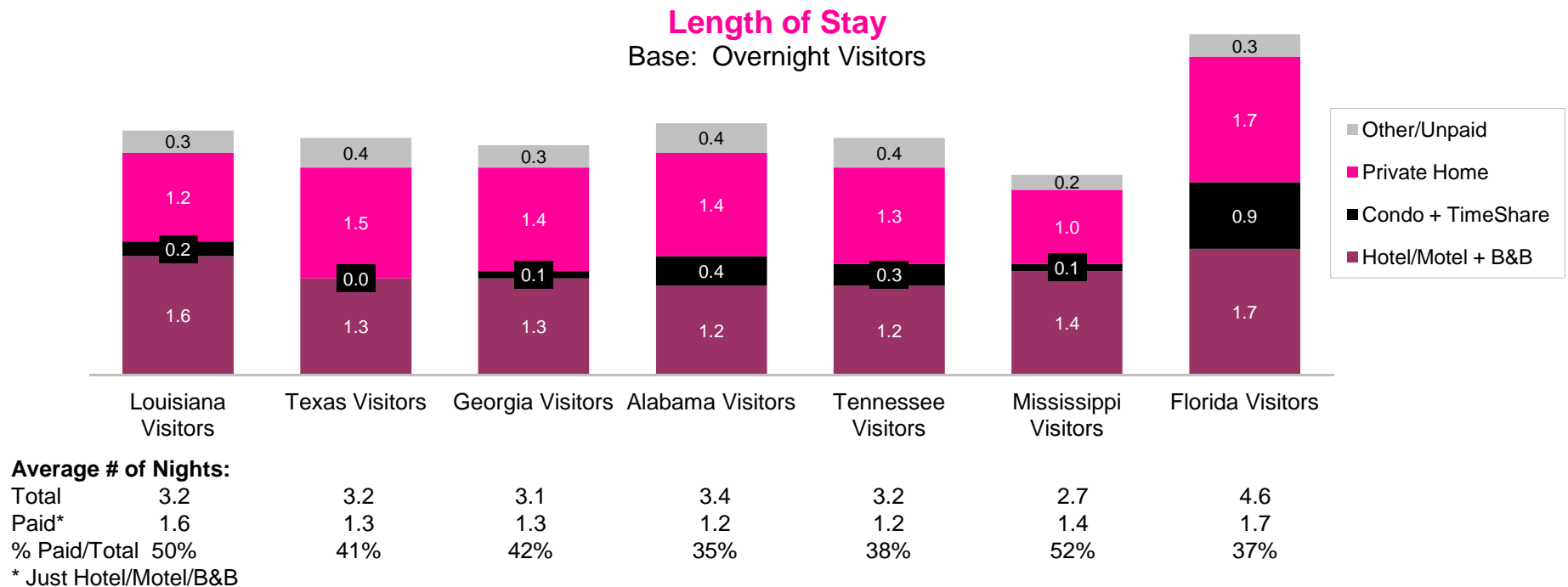


Competitive states: accommodations and length of stay

A third or more stay in hotels/motels/B&Bs

Length of trip varies by destination:

- Florida visitors tend to stay the longest (4.6 nights) and thus lead on the number of nights in a hotel/motel or B&B (1.7) and private homes (1.7), and is the only market with a notable presence in the condo/timeshare market (0.9)
- Louisiana places near average for total nights stayed but, more positively, hosts a higher percentage of those choosing paid hotel/motel/B&B accommodations.



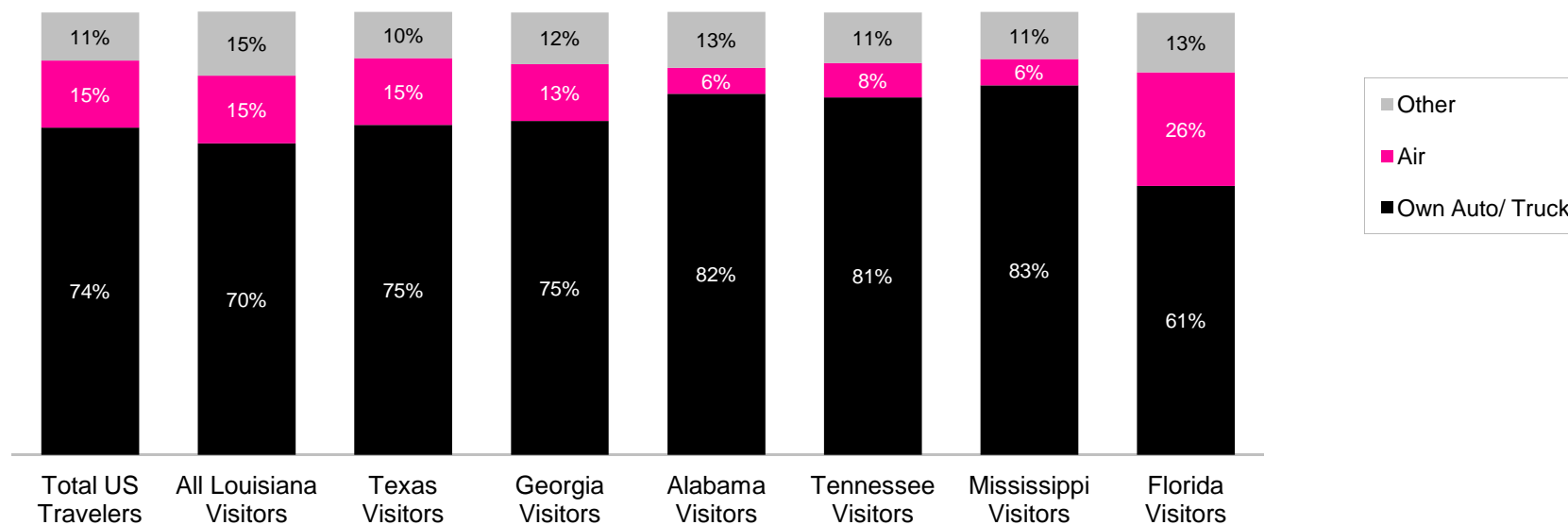
Competitive states: primary mode of transportation

Most travelers drive to their destination

Visitors to Louisiana (70%) and competitor states usually drive – similar to total US travelers (74%):

- Slightly fewer (70%) Louisiana visitors drive than those to competitor states except Florida
- Florida visitors far more often (26% vs. 15% nationally) choose to fly than those traveling elsewhere
- Alabama (82%), Mississippi (83%), and Tennessee (81%) visitors rely slightly more heavily on their cars.

Primary Mode of Transportation of Louisiana Visitors



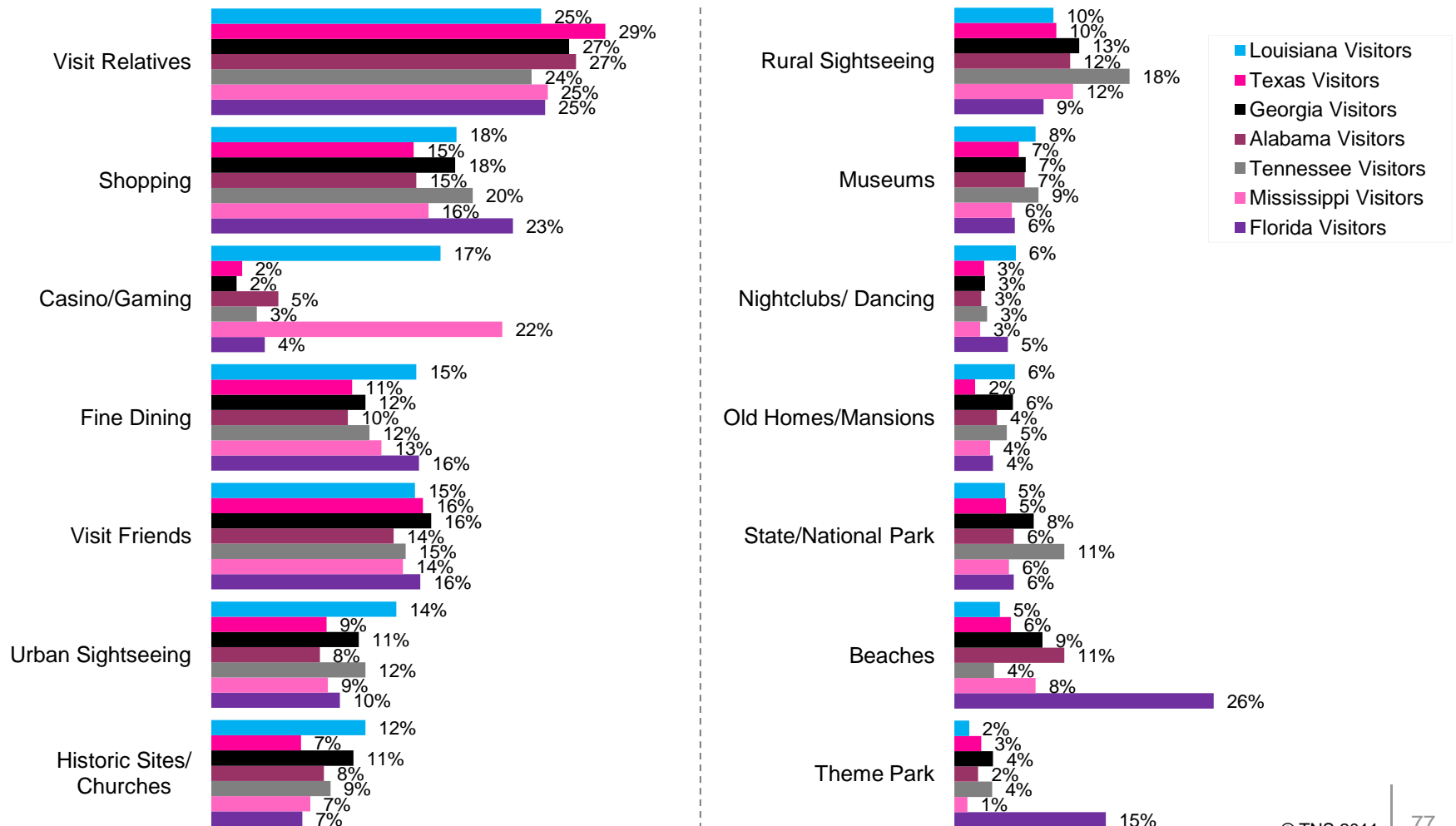
Competitive states: top 10 vacation activities

Top vacation activities/attractions vary substantially by state

Louisiana tops other destinations for *nightclubs/dancing*, *urban sightseeing*, *historic sites/churches*, and nearly ties Florida for *fine dining*. Other destination “ownership” includes: Florida for *theme parks* and *beaches*, Tennessee for *rural sightseeing*, and Mississippi for *gaming*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Top 12 Activities plus Theme Parks)



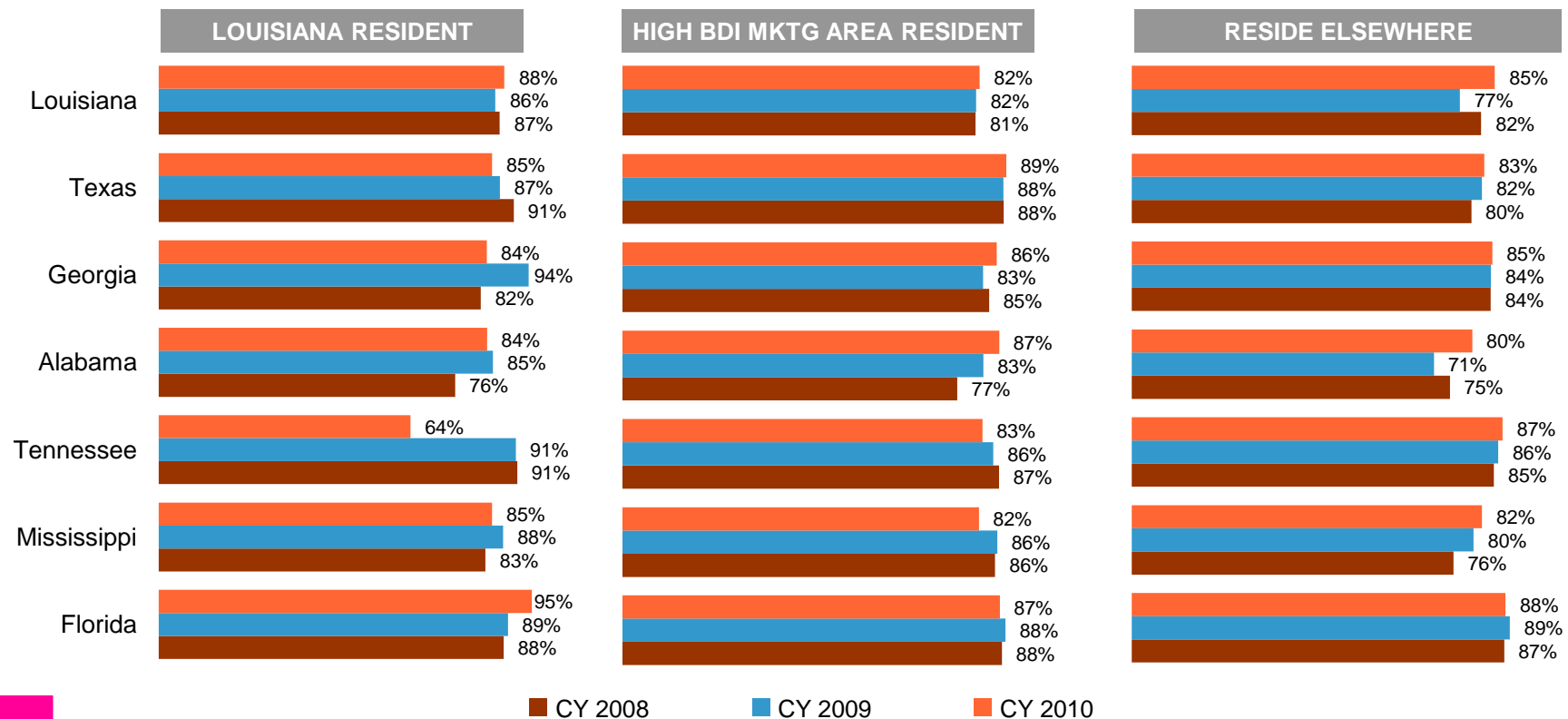
Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Competitive states: satisfaction

Louisiana satisfies visitors, but lags several competitors

- **In-state residents** place Louisiana slightly above all competitors except Florida
- Although Louisiana ties Mississippi for last **within the High BDI Marketing Area**, all competitors score similarly (between 82% and 89%)
- Among those **outside the state and the High BDI Marketing Area**, Louisiana ties Georgia for third place
- Louisiana 's scores remain very similar to the past among in-state and High BDI Marketing Area residents, but recovers from last year's dip among the most distant visitors.

Extremely/Very Satisfied With Trip to Region Visited (Far Left)



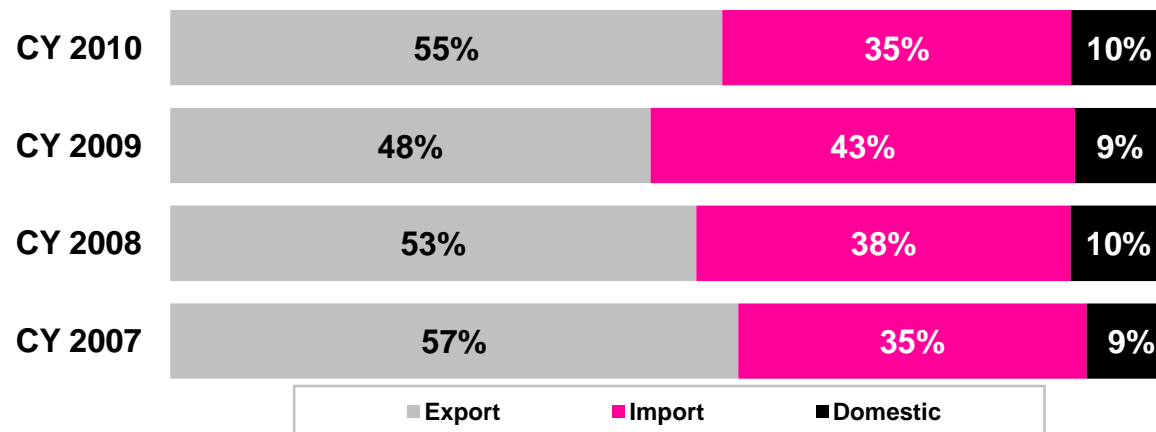
Export ~ Import



Export/Import

“Balance of Trade”

- Louisiana still shows a surplus “balance of trade” for tourism
- CY 2010 reverses the downward trend as exports strengthen over imports
- One in 10 (10%) tourism dollars remain in Louisiana as domestic Louisiana spending
- Spending that occurs outside the state by non-residents are not included in the chart.



Export represents \$ coming into Louisiana (Non-LA residents coming to LA)

Import represents \$ leaving Louisiana (LA residents traveling elsewhere)

Domestic represents \$ staying in Louisiana (LA residents spending within LA)

Segment/Destination Profiles



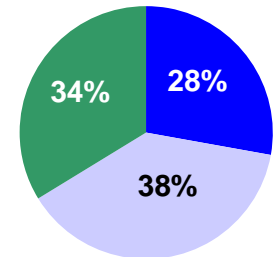
Mature visitor profile

Market relevance

The proportion of Louisiana's visitors that are 55 or older (34%) nearly matches the US as a whole (33%). Comparisons below = (Mature Louisiana visitors vs. Total Louisiana visitors)

By Age (Mature = 55+)

■ Under 35
■ 35 - 54
■ 55+



Demographic Profile:

- Age: By definition, this group is older (64 vs. 47)
- Income: Somewhat higher incomes (\$73,700 vs. \$67,200)
- Married: Somewhat more than average (63% vs. 59%)
- Household composition: Usually live alone (26% vs. 23%) or with one other person (50% vs. 34%) and much less likely to live with children under 18 than average Louisiana visitors (7% vs. 32%)
- Ethnicity: Much more likely Caucasian (87% vs. 78%); less likely African American (9% vs. 16%)
- Residence: Less likely to be a Louisiana resident (23% vs. 36%)
- Employment: Very likely to be retired (44% vs. 17%), as expected for this age group.

Trip Profile:

- Purpose: Almost as likely to *visit friends/relatives* (36% vs. 39%), and somewhat more likely to visit for *entertainment/sightseeing* (20% vs. 17%)
- Length of stay: Just as likely to spend the night (72% vs. 72%) and for about the same length of time when they do (3.3 vs. 3.2 nights); they opt for paid (hotels/motels) lodging about as often (48% vs. 50%)
- Travel party: Often travel in pairs (51% vs. 40%), usually with another household member (47% vs. 36%)
- Mode: Typically drive their own car (66% vs. 70%)
- Planning horizon: Less likely to make a last minute trip (34% vs. 42% decide within 2 weeks of trip)
- Activity choices: More often gamble (21% vs. 17%) and sightsee – both urban sightseeing (19% vs. 14%) and rural sightseeing (17% vs. 10%)
- Spending: More overall (\$673 vs. \$513) and more on gaming (\$158 vs. \$78), consistent with activities
- Satisfaction with Louisiana: Slightly more satisfied than average (87% vs. 85% extremely/very satisfied).

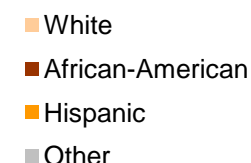
African-American visitor profile

Market relevance

About one in six (16%) Louisiana visitors claim African-American heritage, over twice that of US travelers overall (6%).

Comparisons below = (African-Americans vs. Total Louisiana visitors)

Ethnicity



Demographic Profile:

- Age: Much younger than average (39 vs. 47) with almost half under 35 (48% vs. 28%)
- Income: Lowest of segments reviewed (\$52,600 vs. \$67,200), including in-state visitors (\$57,400)
- Married: Least likely married (37% vs. 59%), which contributes to lower incomes
- Household composition: More likely to live alone (31% vs. 23%); equally likely to live with children (32%)
- Residence: Slightly more live in-state (40% vs. 36%)
- Employment: Slightly less likely to be employed full-time (58% vs. 64%).

Trip Profile:

- Purpose: Most likely of segments to *visit friends/relatives* (50% vs. 39%)
- Length of stay: Nearly as likely to spend the night (67% vs. 72%), they stay just slightly longer (3.4 vs. 3.2 nights); they also swap hotel accommodations (38% vs. 50%) for private homes (50% vs. 38%)
- Travel party: More likely to travel in a larger (3+) group (37% vs. 32%) and with children (29% vs. 23%)
- Mode: Usually drive (65% vs. 70%), but often rent a car (8% vs. 4%) or catch a bus (6% vs. 2%)
- Planning horizon: More spontaneous (51% vs. 42% decide to visit Louisiana within two weeks of trip)
- Activity choices: African-Americans more often visit relatives (29% vs. 25%, consistent with lodging), gamble (22% vs. 17%), and opt for nightclubs/dancing (10% vs. 6%, consistent with age)
- Spending: Spend the least (\$360 vs. \$513) of any segment except in-state visitors (\$192)
- Satisfaction with Louisiana: Relatively satisfied with Louisiana, similar to all visitors (84% vs. 85%).

Hispanic visitor profile

Market relevance

The smallest segment reviewed, only one in about 30 Louisiana visitors (3.5%) claim Hispanic heritage, somewhat less than the level of US travelers overall (4%). Comparisons below = (Hispanics vs. Total Louisiana visitors)

Demographic Profile:

- Age: Somewhat younger the average Louisiana visitors (43 vs. 47)
- Income: Similar to the average (\$66,900 vs. \$67,200)
- Married: More likely married (74% vs. 59%)
- Household composition: More live in larger (3+) households (59% vs. 43%) with children (47% vs. 32%)
- Residence: Average proportion lives in-state (38% vs. 36%)
- Employment: Most work full-time, more than average (72% vs. 64%).

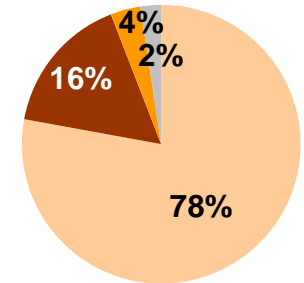
Trip Profile:

- Purpose: See friends/relatives less than total US (32% vs. 39%); more seek entertainment (25% vs. 17%)
- Length of stay: Most likely to stay overnight (82% vs. 72%) and for a longer period of time (5.8 vs. 3.2 nights, but they spend less time in a hotel/motel/B&B (38% vs. 50%) than elsewhere
- Travel party: More often travel in larger (3+) groups (47% vs. 32%) with children (40% vs. 23%)
- Mode: Usually drive (76% vs. 70%); but twice as likely to rent a car (8% vs. 4%)
- Planning horizon: Not very spontaneous (35% vs. 42% decide to visit LA within two weeks of the trip)
- Activity choices: More often shop (22% vs. 18%), rural sightsee (16% vs. 10%), and visit museums (12% vs. 8%) and old homes/mansions (12% vs. 6%) than others
- Spending: Spend about average (\$494 vs. \$513)
- Satisfaction with Louisiana: Slightly higher satisfaction (87% vs. 85% extremely or very satisfied).

Caution: Small Sample (31) yields less reliable comparisons

Ethnicity

- White
- African-American
- Hispanic
- Other



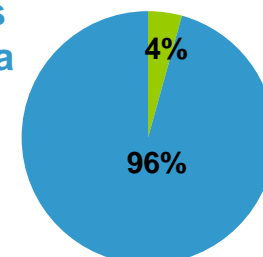
Alexandria visitor profile

Market relevance

About one in 25 (4%) Louisiana visitors stops in Alexandria.
Comparisons below = (Alexandria vs. Total Louisiana visitors)

% of Louisiana Visitors
Who Went to Alexandria

■ Alexandria
■ Non-Alexandria



Demographic Profile:

- Age: Somewhat younger (42 vs. 47)
- Income: Much less affluent (\$44,400 vs. \$67,200)
- Married: More often married (65% vs. 59%)
- Household composition: Average levels who live alone (23% vs. 23%), with one other (37% vs. 34%), in larger (3+) households (40% vs. 43%), and with children under 18 (35% vs. 32%)
- Ethnicity: Less likely Caucasian (55% vs. 78%); more often African-American (25% vs. 16%)
- Employment: Above average full-time employment (72% vs. 64%)
- Residence: Most visitors live in-state (61% vs. 36%).

Trip Profile:

- Purpose: More likely to come for *business* (21% vs. 17%) or for *personal business* (19% vs. 6%)
- Length of stay: Often spend the night (69% vs. 72%) for an average length of stay (3.2 vs. 3.2 nights) and average use of hotels/motels for lodging (53% vs. 50%)
- Travel party: Less likely to travel alone (12% vs. 28%), more often in a group of 3+ (49% vs. 32%)
- Mode: Drive their own car somewhat more often than the average LA visitor (77% vs. 70%)
- Planning horizon: Above average spontaneity (53% vs. 42% decide to visit within 2 weeks of trip)
- Activity choices: Far more often come to visit relatives (40% vs. 25%) than any other activity
- Spending: Consistent with activity and purpose (visiting), Alexandria visitors spend the least of the six destinations (\$269 vs. \$513)
- Satisfaction with Louisiana: Although highly satisfied, these visitors lag other destinations (73% vs. 85%).

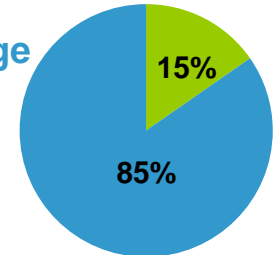
Baton Rouge visitor profile

Market relevance

About one in seven (15%) Louisiana visitors stops in Baton Rouge.
Comparisons below = (Baton Rouge vs. Total Louisiana visitors)

% of Louisiana Visitors
Who Went to Baton Rouge

■ Baton Rouge
■ Non-Baton Rouge



Demographic Profile:

- Age: Somewhat younger (44 vs. 47)
- Income: Almost average affluence (\$64,700 vs. \$67,200)
- Married: Less likely to be married (44% vs. 59%)
- Household composition: More likely to live alone (37% vs. 23%) than with one other person (21% vs. 34%); average level lives in larger (3+) households (42% vs. 43%) and with children < 18 (34% vs. 32%)
- Ethnicity: Average likelihood to be Caucasian (80% vs. 78%) or African-American (18% vs. 16%)
- Employment: Slightly fewer employed full-time (56% vs. 64%)
- Residence: Over half of visitors live in-state (57% vs. 36%).

Trip Profile:

- Purpose: More likely to *visit friends/relatives* (46% vs. 39%)
- Length of stay: Somewhat less likely than average to spend the night (64% vs. 72%); they tend to stay longer (5.6 vs. 3.2 nights), but not in hotels/motels (39% vs. 50%)
- Travel party: More travel solo (41% vs. 28%); fewer in pairs (28% vs. 40%)
- Mode: Drive their own car slightly more often than the average LA visitor (76% vs. 70%)
- Planning horizon: Above average spontaneity (48% vs. 42% decide to visit within 2 weeks of trip)
- Activity choices: They visit relatives (27% vs. 25%), shop (21% vs. 18%), or see friends (20% vs. 15%) more than any other activity and each is slightly above average
- Spending: Only Alexandria visitors spend less than Baton Rouge visitors (\$400 vs. \$513)
- Satisfaction with Louisiana: Highly satisfied, similar to all visitors (87% vs. 85%).

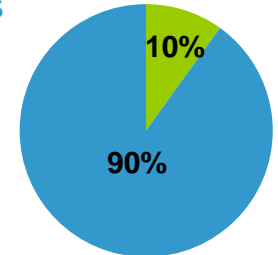
Lafayette visitor profile

Market relevance

About one in 10 (10%) Louisiana visitors stops in Lafayette.
Comparisons below = (Lafayette vs. Total Louisiana visitors)

% of Louisiana Visitors
Who Went to Lafayette

■ Lafayette
■ Non-Lafayette



Demographic Profile:

- Age: Similar age (46 vs. 47)
- Income: Slightly more affluent (\$72,600 vs. \$67,200)
- Married: About average level of marriage (63% vs. 59%)
- Household composition: Fewer live alone (14% vs. 23%), average proportion lives with one other (35% vs. 34%); more live in larger (3+) households (52% vs. 43%) and with children under 18 (40% vs. 32%)
- Ethnicity: About average Caucasian (75% vs. 78%); more often African-American (21% vs. 16%)
- Employment: Average level employed full-time (62% vs. 64%)
- Residence: Half of visitors live in-state (50% vs. 36%).

Trip Profile:

- Purpose: Come much more often to *visit friends/relatives* (56% vs. 39%)
- Length of stay: Typically spend the night (75% vs. 72%) for an average length of stay (3.1 vs. 3.2 nights); less likely to lodge in hotels/motels (29% vs. 50%) than private homes (48% vs. 38%)
- Travel party: Less likely to travel solo (22% vs. 28%); more likely in larger (3+) group (40% vs. 32%)
- Mode: An average level drives their own car (73% vs. 70%)
- Planning horizon: Above average spontaneity (53% vs. 42% decide to visit within 2 weeks of trip)
- Activity choices: By far, the leading activity is to visit relatives (43% vs. 25%)
- Spending: Lafayette visitors spend the third least of these six destinations (\$404 vs. \$513)
- Satisfaction with Louisiana: Most satisfied of the six destinations (90% vs. 85%).

Lake Charles visitor profile

Market relevance

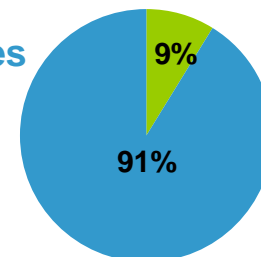
About one in 11 (9%) Louisiana visitors stops in Lake Charles.
Comparisons below = (Lake Charles vs. Total Louisiana visitors)

Demographic Profile:

- Age: Somewhat older (50 vs. 47)
- Income: Below average income (\$57,600 vs. \$67,200)
- Married: Similar level of marriage (55% vs. 59%)
- Household composition: More live alone (32% vs. 23%) and fewer with one other person (27% vs. 34%); average levels live in larger (3+) households (41% vs. 43%), but fewer with children (26% vs. 32%)
- Ethnicity: Predominantly Caucasian (87% vs. 78%); fewer African-Americans (12% vs. 16%) than average
- Employment: Average level of full-time employees (62% vs. 64%), but more retirees (24% vs. 17%)
- Residence: Average levels of visitors live in-state (34% vs. 36%).

% of Louisiana Visitors
Who Went to Lake Charles

■ Lake Charles
■ Non-Lake Charles



Trip Profile:

- Purpose: Less frequently come to *visit friends/relatives* (22% vs. 39%), far more choose *entertainment/sightseeing* (30% vs. 17%)
- Length of stay: Most spend the night (66% vs. 72%) and for longer stays than average (3.8 vs. 3.2 nights); more visitors stay in hotels/motels than elsewhere, but less than average (39% vs. 50%)
- Travel party: Average travel party size (27% vs. 28% solo; 38% vs. 40% pairs; 36% vs. 32% 3+)
- Mode: Drive their own car more often than average (80% vs. 70%)
- Planning horizon: Very spontaneous (56% vs. 42% decide to visit within 2 weeks of trip)
- Activity choices: Dominated by casino/gaming (46% vs. 17%)
- Spending: These visitors spend the second-most after New Orleans (\$475 vs. \$513); 38% on gaming
- Satisfaction with Louisiana: Although usually satisfied, these visitors place below average (77% vs. 85%).

New Orleans visitor profile

Market relevance

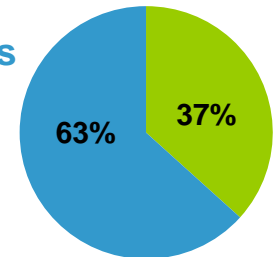
Over a third (37%) of Louisiana visitors stops in New Orleans.
Comparisons below = (New Orleans vs. Total Louisiana visitors)

Demographic Profile:

- Age: Somewhat younger (44 vs. 47)
- Income: Highest among cities visited (\$74,500 vs. \$67,200)
- Married: Slightly less often married (53% vs. 59%)
- Household composition: More live alone (28% vs. 23%) or with one other (37% vs. 34%); fewer live in larger-member (3+) households (35% vs. 43%) or with children under 18 (26% vs. 32%)
- Ethnicity: Slightly fewer Caucasians (73% vs. 78%) and slightly more African-Americans (19% vs. 16%)
- Employment: Slightly above average full-time employment (68% vs. 64%)
- Residence: A quarter of visitors live in-state (25% vs. 36%).

% of Louisiana Visitors
Who Went to New Orleans

■ New Orleans
■ Non-New Orleans



Trip Profile:

- Purpose: Slightly fewer *visit friends/relatives* (34% vs. 39%); more *business* travelers (25% vs. 17%)
- Length of stay: More likely to spend the night (85% vs. 72%) for longer stays (3.7 vs. 3.2 nights) and somewhat above average usage of hotels/motels for lodging (54% vs. 50%)
- Travel party: Often travel in pairs (38% vs. 40%); more visit alone (35% vs. 28%), consistent with more business travelers; fewer come in 3+ groups (28% vs. 32%)
- Mode: Drive their own car less often than average (56% vs. 70%); more often fly (34% vs. 15%)
- Planning horizon: Less spontaneous (33% vs. 42% decide to visit within 2 weeks of trip)
- Activity choices: New Orleans leads on urban activities, with these as the top four: urban sightseeing (28% vs. 14%), fine dining (27% vs. 15%), shopping (27% vs. 18%), historic sites/churches (24% vs. 12%)
- Spending: New Orleans visitors spend more than any of the other six destinations (\$852 vs. \$513)
- Satisfaction with Louisiana: Highly satisfied, placing above the Louisiana average (89% vs. 85%).

Shreveport visitor profile

Market relevance

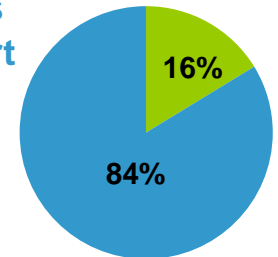
About one in six (16%) Louisiana visitors stops in Shreveport.
Comparisons below = (Shreveport vs. Total Louisiana visitors)

Demographic Profile:

- Age: Average age (47 vs. 47)
- Income: Slightly less affluent (\$62,300 vs. \$67,200)
- Married: More often married (68% vs. 59%)
- Household composition: Fewer live alone (17% vs. 23%), more with one other person (38% vs. 34%), and about the same live in larger (3+) households (46% vs. 43%), but more with children (39% vs. 32%)
- Ethnicity: Similar Caucasian (79% vs. 78%) and African-American (17% vs. 16%) heritage as others
- Employment: Slightly more employed full-time (68% vs. 64%)
- Residence: A little more than a quarter of visitors live in-state (28% vs. 36%).

% of Louisiana Visitors
Who Went to Shreveport

■ Shreveport
■ Non-Shreveport



Trip Profile:

- Purpose: Fewer *visit friends/relatives* (29% vs. 39%); more for *entertainment/sightseeing* (23% vs. 17%)
- Length of stay: Often spend the night (73% vs. 72%), but for less time (2.6 vs. 3.2 nights) and greater use of hotels/motels for lodging (69% vs. 50%)
- Travel Party: More visitors travel in pairs (45% vs. 40%), fewer alone (24% vs. 28%)
- Mode: Typically drive their own car more often than the average LA visitor (78% vs. 70%)
- Planning horizon: Very spontaneous (54% vs. 42% decide within 2 weeks of trip)
- Activity choices: Far more often come for casinos/gaming (41% vs. 17%) than any other activity, although Shreveport trails Lake Charles (46%)
- Spending: Shreveport visitors spend the third-most of the six destinations (\$439 vs. \$513), 41% of the travel budget goes for gaming
- Satisfaction with Louisiana: Although highly satisfied, these visitors place below average (75% vs. 85%).

Appendix



Louisiana's Business Development Index – Top 50

BDI Calculations

- The Business Development Index, calculated for each DMA, measures the propensity of residents to take trips to Louisiana compared to that DMA's proportion of the total population. For example, Biloxi-Gulfport, MS residents represent 0.107% of all US residents, but 2.297% of total Louisiana visitors.
- Those proportions $2.297/0.107$ (x 100) yield a BDI of 2153. The baseline (100) represents an equal proportion of US households as Louisiana visitors from that DMA.

Louisiana High BDI Index: Results by DMA

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Biloxi-Gulfport, MS	329,615	0.107%	343	2.297%	2153
Tyler-Longview, TX	721,143	0.233%	358	2.397%	1027
Abilene-Sweetwater, TX	308,002	0.100%	132	0.884%	887
Beaumont-Port Arthur, TX	452,036	0.146%	192	1.286%	879
Jackson, MS	916,602	0.297%	358	2.397%	808
Hattiesburg-Laurel, MS	297,164	0.096%	104	0.696%	724
Mobile-Pensacola , AL-FL	1,391,419	0.450%	328	2.196%	488
Greenwood-Greenville, MS	203,147	0.066%	35	0.234%	356
Houston, TX	6,205,410	2.009%	1037	6.944%	346
Waco-Temple-Bryan, TX	965,783	0.313%	157	1.051%	336
Victoria, TX	87,878	0.028%	14	0.094%	330
Corpus Christi, TX	569,766	0.184%	87	0.583%	316
Montgomery-Selma, AL	630,222	0.204%	82	0.549%	269
Orlando-Daytona Bch-Melbourne, FL	3,734,092	1.209%	444	2.973%	246
Dallas-Ft. Worth, TX	7,148,975	2.314%	807	5.404%	234

Louisiana's Business Development Index – Top 50 *(con't)*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Austin, TX	1,848,220	0.598%	208	1.393%	233
Paducah-Cape Girardeau-Harrisburg, KY-MO-IL	983,721	0.318%	100	0.670%	210
Columbia, SC	1,030,725	0.334%	87	0.583%	175
Little Rock-Pine Bluff, AR	1,436,080	0.465%	117	0.783%	169
Meridian, MS	185,634	0.060%	14	0.094%	156
Grand Junction-Montrose, CO	191,096	0.062%	14	0.094%	152
Ft. Smith-Fayetteville-Springdale-Rodgers, AR	791,059	0.256%	50	0.335%	131
Springfield, MO	1,056,699	0.342%	66	0.442%	129
Memphis, TN	1,777,568	0.575%	109	0.730%	127
Kansas City, MO-KS	2,412,071	0.781%	146	0.978%	125
Panama City, FL	374,129	0.121%	22	0.147%	122
Bangor, ME	341,132	0.110%	18	0.121%	109
Wilmington, NC	447,397	0.145%	23	0.154%	106
Tampa-St.Petersburg (Sarasota), FL	4,369,328	1.414%	202	1.353%	96
Birmingham (Anniston and Tuscaloosa), AL	1,859,444	0.602%	84	0.562%	93
Buffalo, NY	1,578,747	0.511%	71	0.475%	93
Lima, OH	185,971	0.060%	8	0.054%	89
Savannah, GA	864,744	0.280%	36	0.241%	86

Louisiana's Business Development Index – Top 50 *(con't)*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Palm Springs, CA	454,080	0.147%	18	0.121%	82
Columbus-Tupelo-West Point, MS	489,501	0.158%	19	0.127%	80
San Antonio, TX	2,402,296	0.778%	90	0.603%	78
Oklahoma City, OK	1,777,794	0.575%	66	0.442%	77
Albuquerque-Santa Fe, NM	1,867,154	0.604%	65	0.435%	72
Champaign & Springfield-Decatur, IL	961,120	0.311%	33	0.221%	71
Evansville, IN	723,959	0.234%	24	0.161%	69
Cedar Rapids-Waterloo-Iowa City-Dubuque, IA	870,316	0.282%	28	0.187%	67
Spokane, WA	1,104,701	0.358%	35	0.234%	66
Richmond-Petersburg, VA	1,434,551	0.464%	44	0.295%	63
Atlanta, GA	6,658,139	2.155%	204	1.366%	63
San Diego, CA	3,109,270	1.006%	95	0.636%	63
Salisbury, MD	397,626	0.129%	12	0.080%	62
Columbus, OH	2,302,912	0.745%	69	0.462%	62
Nashville, TN	2,626,905	0.850%	75	0.502%	59
Raleigh-Durham (Fayetteville), NC	2,912,425	0.943%	83	0.556%	59
Burlington-Plattsburgh, VT-NY	842,458	0.273%	24	0.161%	59

Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Louisiana residents vacationing elsewhere)
Export	Money entering the state (Non-Louisiana residents visiting Louisiana)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1, 2010 through December 31, 2010
In-State	Louisiana
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
High BDI Marketing Area	DMAs where residents have an above average propensity to visit Louisiana
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This may eliminate some leisure day trips that are closer than 50 miles away.
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Louisiana in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)

Research Methods

The syndicated TravelsAmerica study uses a web-based research methodology. Sample is selected from the TNS 6th dimension USA Panel with monthly e-mail invitations sent to representative households with a target response rate of 45%. The field period runs for two weeks each month, usually starting in the middle of the first week. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

To enhance relevance, the data are weighted two ways:

- Demographic weights adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- Trip projection calculations count every trip taken by respondents for total trips taken and in the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate household travel party size for each trip as well..

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

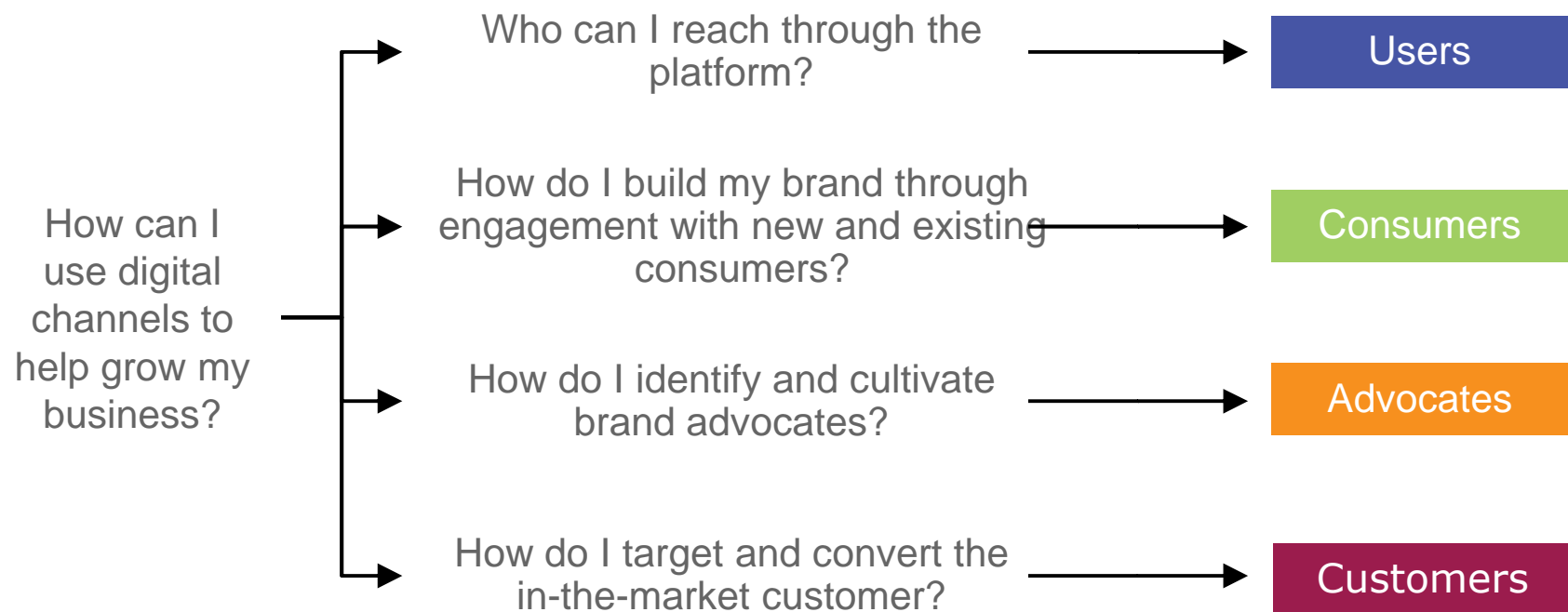
This special report focuses on results for Louisiana. For the calendar year ending December 31, 2010, respondents for key segments in this report are shown below.

CY 2010 Number of Travelers (Unweighted Respondents)	CY 2010 Number of Travelers (Weighted by Demographics)	Region
1,413	1,521	Louisiana Residents
13,983	14,431	High BDI Marketing Area
108,970	109,086	Reside Elsewhere (not Louisiana, not High BDI Mktg Area)
124,366	125,038	Total for TravelsAmerica

Digital Life Coming to TravelsAmerica Soon!

Digital Life identifies opportunities to grow your business, through a precise understanding of digital human attitudes and behaviors such as how travellers interact with their mobile phones, pcs, tablets, and social networking platforms.

Digital Life will pinpoints the range of growth opportunities available to Louisiana in the online world



Addressing the key questions that inform strategic marketing investment

Users “I am online”

To reach the "Digital User":

- What's the reach, size, structure of the digital channel?
- Can I get my message to users in new markets?
- How do I communicate with my target group?

Consumers “I engage with brands online”

To engage with the “Digital Consumer”:

- How are consumers interacting with brands online?
- Should I build friends and fans on social networks?
- What brand opinions are consumers forming through digital?

Advocates “I tell others online about brands”

To identify & cultivate the “Digital Advocate”:

- What is the level and influence of buzz for my category?
- Who is talking about my category and who is listening?
- What's the impact of negative conversation online?

Customers “I use online prior to and for purchase”

To convert the “Digital Customer”:

- What is the role of online and offline channels throughout the path-to-purchase, for researching and buying products?
- How can I encourage my customers to purchase online?

A person stands on a dark, rocky mountain peak, looking out over a vast, hazy landscape of rolling hills and valleys. The sky is a deep, vibrant purple, suggesting a sunset or sunrise. The word "DISCOVER" is written in large, bold, white capital letters across the center of the image. In the bottom right corner, there is a small copyright notice: "© 2011 TNS |".

DISCOVER